

Market Orientation and Brand Orientation of Media Outlets

An investigation of strategic orientations and their relations to success factors

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Abstract

In times of digitalization and convergence, media outlets try to serve audiences and advertisers on multiple channels and platforms. Consequently, media managers are forced to further develop existing products as well as bring new services to the market. In doing so, the following is important to know: *What makes media outlets successful, independent from types of media and means of distribution?*

To answer this question, market orientation and brand orientation, which have a positive influence on success in other industries, are for the first time comprehensively applied to media outlets. Moreover, success factors of media products and services are brought to the same level of abstraction, which makes them independent from types of media and means of distribution. To meet the developments in media practice, it is suggested to distinguish media outlets based on seriality and content.

The findings show differences regarding the influence of market orientation and brand orientation on success, depending on the business model, the positioning, and the maturity of the media outlet. The two strategic orientations need to be emphasized and balanced appropriately for media outlets to be successful. It is recommended to shift from market orientation to brand orientation over time and emphasize brand orientation if focusing on high quality. When relating market orientation and brand orientation to the identified building blocks of media success, both strategic orientations influence content, marketing, and external evaluation. Environmental orientation and distribution are dominated by market orientation. Brand orientation influences design, internal processes, organizational aspects, leadership, and human resources. Overall, brand orientation is more important in the media, compared to other industries, since it enables following multiple goals, creating trust, and integrating market intelligence in a two-sided market.

Synopsis

1 Introduction

1.1 Problem statement

Media managers are facing difficult challenges. Audiences' consumption patterns and needs are changing, advertisers' budgets and wants are shifting, and the competitive landscape is in motion. For decades, books, newspapers, magazines, radio, film, and television have been distinct media with equally distinct production characteristics. However, because of digitalization and convergence, the boundaries have disappeared and they are no longer valid. As a result, media outlets try to serve audiences and advertisers on multiple channels and platforms (Carvajal & García Avilés, 2008; Caspar, 2002; Colapinto, 2010). In doing so, media managers are forced to further develop existing products as well as bring new services to the market (McKelvie & Wiklund, 2008). Consequently, the following question arises: *What makes media outlets successful, independent from types of media and means of distribution?*

While findings from other industries cannot be transferred to the media without further ado because of media's distinct characteristics (Berkler, 2008; Büsching, Hellbrück, & Teluk, 2011; Köhler, 2005; Zwikaël & Globerson, 2006), success factor research in the media grew into a broad and fragmented field. Drivers of movies' box office revenue have received the most attention thus far (Clement, 2004; Simonton, 2009). Similarly, multiple studies have investigated the success of books (Blömeke, Clement, Mahmudova, & Sambeth, 2007). On the other hand, research on periodical media—such as newspapers or television—has been less common and less standardized (e.g. Schönbach, 2004; Shamsie, Miller, & Greene, 2006). Overall, studies tend to focus on single types of media, selected success factors, and certain contexts. This is problematic since it no longer meets media development and production practices. Consequently, summarizing, systematizing, and integrating findings from success factor research in the media are desperately needed. In doing so, the relationships of success factors are particularly interesting since they have been widely ignored in previous research. Two strategic orientations, market orientation and brand orientation, are frequently discussed in marketing literature. Although they potentially influence success and success factors, they have yet to be sufficiently applied to the media.

1.2 Research interest and research questions

Strategic orientations are “the guiding principles that influence a firm’s marketing and strategy-making activities” (Noble, Sinha, & Kumar, 2002, p. 25). They are a mindset, culture, and resource, which are foundational to and permeate the entire organization (Gromark & Melin, 2011; Narver & Slater, 1990; Reid, Luxton, & Mavondo, 2005; Urde, 1999). Accordingly, strategic orientations are independent from different types of media and they are universally applicable across the media industry. This is why they increase in importance during times of digitalization and convergence.

Amongst strategic orientations, market orientation theory has been well established. It places the customer at the center of attention and is labeled an outside-in perspective (Kohli & Jaworski, 1990; Narver & Slater, 1990). Brand orientation, on the other hand, suggests an inside-out approach, using brand identity as the starting point and hub around which an organization’s processes revolve (Urde, 1994, 1999). For both orientations, studies have found a positive influence on success (e.g. Narver & Slater, 1990; Wong & Merrilees, 2008). However, their relation is not unproblematic since they have potentially opposing focal points (Urde, 1999). This is particularly interesting in the media where following the market as well as adopting tools from the world of commerce, such as brands, is either criticized or comes with obstacles (Cohen, 2002; Currah, 2009; Lampel, Lant, & Shamsie, 2000; McManus, 1994; Siegert, 2002).

To investigate market orientation and brand orientation in the media, both concepts need to be applied to media outlets considering the distinct characteristics of media products and services. Subsequently, their importance for a media outlet’s success is of utmost interest. For contextualization and to meet media development and production practices, the findings of success factor research in the media should also be brought to a level of abstraction, which makes them independent from different types of media that are based on means of distribution. In this regard, the question of “What could be an alternative categorization system to distinguish media products and services in times of digitalization and convergence?” arises. Finally, how market orientation and brand orientation have to be balanced in the media to be successful must be examined in more detail. Based on the relationship of these two strategic orientations, their influence on success factors in the media needs to be addressed.

Success factors are resources that can be managed by media managers to influence a certain performance measure. Naturally, the question of “What is success?” arises. In the context of media, the definition is difficult. One can distinguish between economic and cultural success. However, the latter needs the former to some extent in order to be sustainable. Even when focusing on economic success,

which is arguably more fundamental, multiple options, such as revenue, profit or profit margin, can be considered. In doing so, whether the products and services are funded by the audience, advertisers or other stakeholders must be taken into account. As it is not possible to cover all of the different measures, the focus of the present synopsis lies on success on the audience side, which is a determinant of revenue and arguably more important (Kaiser & Wright, 2006; Perez-Latre, 2007). Ultimately, without readers, listeners, viewers, and users, the media outlet cannot serve advertisers and/or stakeholders, such as cultural institutions, at all. Moreover, the reach of media products and services is well comparable across different types of media and contexts.

After defining success, it can be measured on different levels. Organizations (e.g., *Axel Springer*), media outlets or media brands (e.g., *Bild*), and single products or services (e.g., *Bild.de*) are potential units of analysis. Following the argument that traditional boundaries between types of media are no longer valid and the findings of success factor research need to be generalized, the focus lies on media outlets or media brands, respectively, which are a unique environment that is independent from technical means of distribution. In the following, the terms “media outlet” and “media brand” will be used interchangeably when referring to the unit of analysis.¹ Consequently, media outlet and media brand can describe continuously produced informational content as well as a one-off entertainment project. This approach is also the best match for current trends in media practice, such as transmedia storytelling (Scolari, 2009), transmedia production (Quandt & Singer, 2009), and transmedia distribution (Doyle, 2010).

From the research interest, the following research questions are derived and depicted in Figure 1:

- How can market orientation be applied to media outlets? (RQ 1)
- How can brand orientation be applied to media outlets? (RQ 2)
- How can the success factors of media products and services be summarized and generalized? (RQ 3)
- How are market orientation and brand orientation balanced in the media? (RQ 4)
- How are market orientation and brand orientation related to the success factors in the media? (RQ 5)

¹ Regarding the unit of analysis, the use of both terms, media outlet and media brand, is due to the contexts of individual projects and papers. However, in relation to brand management, brand identity, and brand orientation, the term “media brand” will also mean what a media outlet stands for, such as values, thoughts, and feelings (see Section 2.2; Sommer, 2015; Sommer & Marty, 2015).

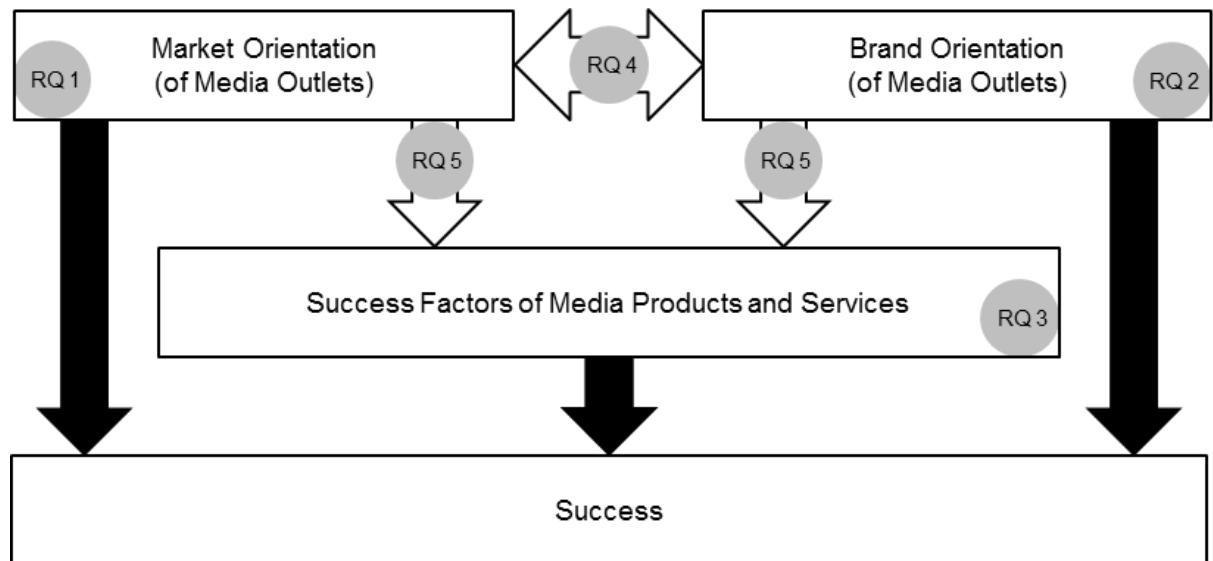


Figure 1: Visualization of the research interest and research questions

1.3 Positioning within media economics and management

The problem statement, the research interest, and the research questions are within the scope of media economics and management. It is a transdisciplinary field in which media and communication studies on the one hand and economics and business studies on the other are most dominant (Albarran, 2014; Altmeppen & Karmasin, 2003; Picard, 2006). In brief, the former focus on content, its production and its implications for culture and society, whereas the latter investigate products, their organization, and economic success.

Within media economics and management, strategic management is the most widely used theoretical or conceptual framework (Mierzejewska & Hollifield, 2006). Two dominant perspectives can be distinguished: 1) the industrial organization and structure-conduct-performance paradigm focus on the external environment; and 2) the resource-based view emphasizes a firm's internal characteristics (Chan-Olmsted, 2006a, 2006c). Historically, industrial organization studies have been the focal point (Picard, 2002a). However, Chan-Olmsted (2006c) argues that the resource-based view might provide more insight into explaining differential success between media outlets. Resources can be differentiated in competencies, which are organization-specific capabilities and strategic assets that encompass tangible and intangible properties (Habann, 2000). When fulfilling the criteria value, rareness, non-substitutability, and inimitability, they are expected to create a sustainable competitive advantage for a firm (Barney, 1991).

Strategic orientations, such as market orientation and brand orientation, are defined as dynamic capabilities and core competencies and are linked to performance. Therefore, they can be classified with the resource-based view and related to success factor research (Day, 1994; Noble et al., 2002; Teece, Pisano, & Shuen, 1997; Urde, 1999). Success factor research investigating competencies and strategic assets also lies within the scope of the resource-based view since it focuses on internal characteristics that can be influenced by management to impact performance (Chan-Olmsted, 2006c; Illenberger, 2013). Overall, success factor research is a fragmented and heterogeneous field drawing on multiple disciplines and methodological approaches. Qualitative and quantitative as well as exploratory and confirmatory research can be distinguished. All the more, the characteristics of media products and services must always be taken into account (Chan-Olmsted, 2006b).

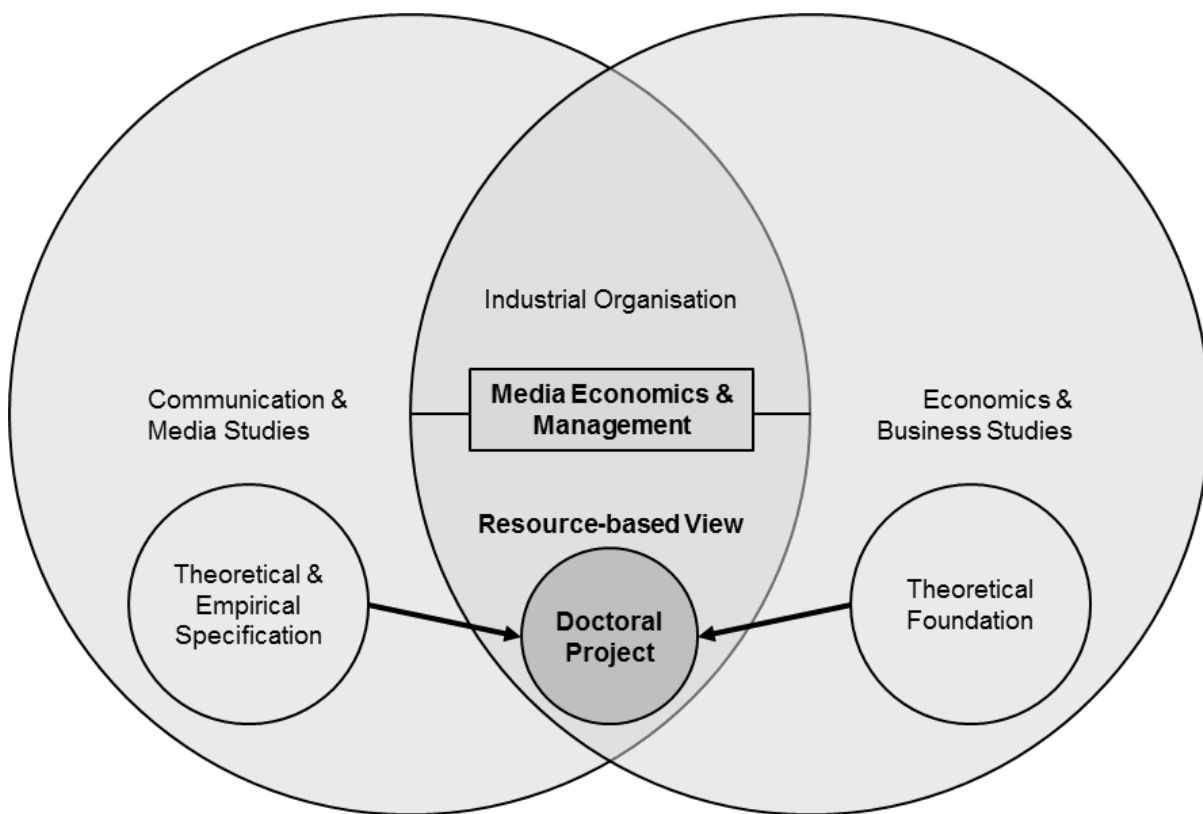


Figure 2: Positioning of the doctoral project within media economics and management

Regarding the present investigation of strategic orientations and success factors in the media, the starting point includes theories and research, which originate from economics and business studies. More precisely, market orientation and brand orientation have emerged within the discipline of marketing (Keller, 2008; Kohli & Jaworski, 1990; Narver & Slater, 1990; Urde, 1994, 1999). Their

specification and application to the media is based on theories and empirical findings within the field of communication and media studies, such as the distinct characteristics of media products and services (Chan-Olmsted, 2006b; Kaiser & Wright, 2006; Kiefer, 2005; see Figure 2). Regarding the empirical work, the doctoral project follows a largely exploratory approach that applies qualitative and quantitative methods, depending on the state of research.

1.4 Significance of the research

The research questions are of interest beyond academic disciplines as well as for media practice.

From a theoretical perspective, the application of market orientation and brand orientation to media outlets is important since it addresses an academic void in media management literature. In prior research, communication and media studies have neglected media management aspects or economics and business studies have disregarded the characteristics of media products and services. In considering the theories and empirical findings from both disciplines, the relationship of the two strategic orientations is particularly interesting as media outlets generally follow a wide range of goals (Demers, 1996). Consequently, a comprehensive investigation is still needed. Furthermore, the potential of strategic orientations in the media in times of digitalization and convergence is increasing, especially since they are not tied to any means of distribution. In doing so, their influence on success factors may also be rising.

Correspondingly, success factor research has to be brought to a level of abstraction, which makes it independent from different types of media that are based on technical characteristics. Summarizing, generalizing, and integrating the findings in a universal model can provide a foundation for success factor research. In systematizing the field, the transferability to different contexts is enhanced and links for the conceptualization of future studies are created. Likewise, developing an alternative framework to distinguish media outlets in times of digitalization and convergence provides a starting point for future research. In meeting the reality of media practice, it would be essential for updating and applying theory as well as in designing research projects in media management, media and communication studies, economics and business studies, and other related disciplines.

For media practice itself, an alternative framework offers an option for market demarcation as the competitive landscape is changing and new products and services are evolving. In this uncertain environment, media managers need to know about universal success factors across means of distribution to develop and improve their products and services. In German-speaking countries, the

imitation of products and services that have been successful elsewhere is extremely common (Lobigs, Spacek, Siegert, & Weber, 2005; Mueller-Oerlinghausen & Sauder, 2003; Schnell, 2008; Trevisan, 2003). The example of free papers illustrates that, on occasions, products and services are even introduced by foreign media companies (Helgesen, 2002). Knowledge of universal success factors can, in this context, contribute to the compensation of structural disadvantages of small markets. Regarding market orientation and brand orientation, the potential of these two strategic orientations in the media is of interest as well as a suggestion on how they should be balanced to be successful. This can provide media managers with guidelines regarding what to focus on, which is particularly important since strategic orientations permeate the entire organization.

In addition to the importance of the research beyond academic disciplines and for media practice, successfully developing and improving media products and services can benefit society as a whole. They are not only a commercial but also a cultural good. Therefore, they affect opinions and views amongst the audience. As a consequence, they are important from a democratic theory point of view. From an economic perspective, the success of new media products and services is desirable as it means that the wants and needs of readers, listeners, viewers, and users are met in a better way. To fulfill both, knowledge of the strategic orientations and the success factors is essential.

1.5 Approach of the doctoral project

To answer the research questions, the doctoral project investigates market orientation, brand management and success factor research independently before linking the three streams of research in the present synopsis (see Table 1).

In two papers, market orientation theory is applied to media outlets (RQ 1). Prior research has favored a journalism perspective over a media management one. In doing so, the characteristics of media products and services have been insufficiently addressed by focusing on content and its audience. Hence, the first study investigates overall market orientation, audience orientation, and competitor orientation in the news industry based on standardized interviews in relation to a news outlet's success (Sommer & Krebs, 2016). In an extension, the second paper examines the processes of user orientation, business orientation, and competitor orientation of online news startups based on four case studies (Sommer, 2016). A combination of quantitative and qualitative methods was chosen based on the state of research. A few studies have investigated the market orientation concept in the media, which allows for building on the research and the findings to choose a quantitative design for the first paper.

Processes, however, have been largely unexplored, which calls for an unstandardized approach in the second study.

Two papers apply brand management concepts to media outlets (RQ 2). Prior research has focused on the audience side while neglecting a media brand's importance in the advertising market. Accordingly, the theoretical paper argues for developing a brand strategy from the brand identity for audiences and advertisers. The potential benefits for media outlets and advertisers are presented (Sommer, 2015). The second paper investigates the importance of the media brand amongst media planners based on standardized interviews and derives implications for media outlets' brand management (Sommer & Marty, 2015). The two papers reflect previous research efforts being more comprehensive in focusing on a narrower field within media brand management. In doing so, a quantitative method is chosen since it is possible to build on the findings of other studies. In the course of the synopsis, brand management is extended to the approach of brand orientation.

In three papers, success factor research in the media is addressed (RQ 3). Prior research has focused on single types of media, selected success factors, and certain contexts. Consequently, the findings of success factor research in the media are summarized in the form of a meta-analysis (Sommer & von Rimscha, 2013). A theoretical paper suggests an alternative framework to distinguish media outlets in times of digitalization and convergence (Sommer & von Rimscha, 2014), which is applied in the sampling process of the subsequent study. Media brands are selected depending on seriality and content to investigate how the success factors can be generalized beyond different types of media based on semi-structured, in-depth interviews with media professionals (Sommer, von Rimscha, Verhoeven, Krebs, & Siegert, 2016). The qualitative approach is selected since the study is the first comparable effort.

In the synopsis, market orientation and brand orientation are investigated by focusing on their relationship (RQ 4), which has previously not been addressed in the context of media. Moreover, the two strategic orientations' influence on success factors is examined (RQ 5). This concluding study is based on the analysis of the transcripts of the semi-structured, in-depth interviews regarding universal success factors in the media, as mentioned earlier. The qualitative method is selected because of a lack of research to build on.

Table 1: Papers that the doctoral project encompasses

RQ	Title	Theoretical foundation	Type of contribution	Data	Analysis
1	Sommer & Krebs, 2016: Market orientation in news media	Market orientation	Empirical study	Quantitative	Exploratory
1	Sommer, 2016: Market orientation of news startups	Market orientation	Empirical study	Qualitative	Exploratory
2	Sommer, 2015: Media brands and the advertising market	Brand management	Theoretical paper	n.a.	n.a.
2	Sommer & Marty, 2015: The role of media brands in media planning	Brand management	Empirical study	Quantitative	Exploratory
3	Sommer & von Rimscha, 2013: Was macht Medien erfolgreich?	Success factors	Meta-analysis	Qualitative	Exploratory
3	Sommer & von Rimscha, 2014: Jenseits von traditionellen Mediengattungen: die transmediale Angebotsmatrix	Digitalization & convergence	Theoretical paper	n.a.	n.a.
3	Sommer et al., 2016: Success factors of media product brands	Success factors	Empirical study	Qualitative	Exploratory
4 & 5	Synopsis	Market orientation, brand orientation & success factors	Empirical study	Qualitative	Exploratory

The remainder of the synopsis is structured as follows (see Figure 3):

Subsequent to the introduction (1), the dominant research streams of the doctoral project as well as the reasoning and findings of the particular papers are summarized in brief (2). Market orientation (2.1), brand management and its extension to brand orientation (2.2) along with success factor research in the media (2.3) form the ground of the concluding synopsis.

In the following section, market orientation and brand orientation are linked and related to success factor research in the media (3). After reviewing the literature on the two strategic orientations and their relationship (3.1), the methodological approach is described (3.2). The results are presented (3.3) and discussed (3.4). The section ends with limitations and suggestions for further research (3.5) and a conclusion (3.6) regarding the synopsis.

The résumé (4) reveals the theoretical and managerial implications of the doctoral project (4.1). Finally, general limitations and further research are discussed (4.2), which are followed by the conclusion (4.3).

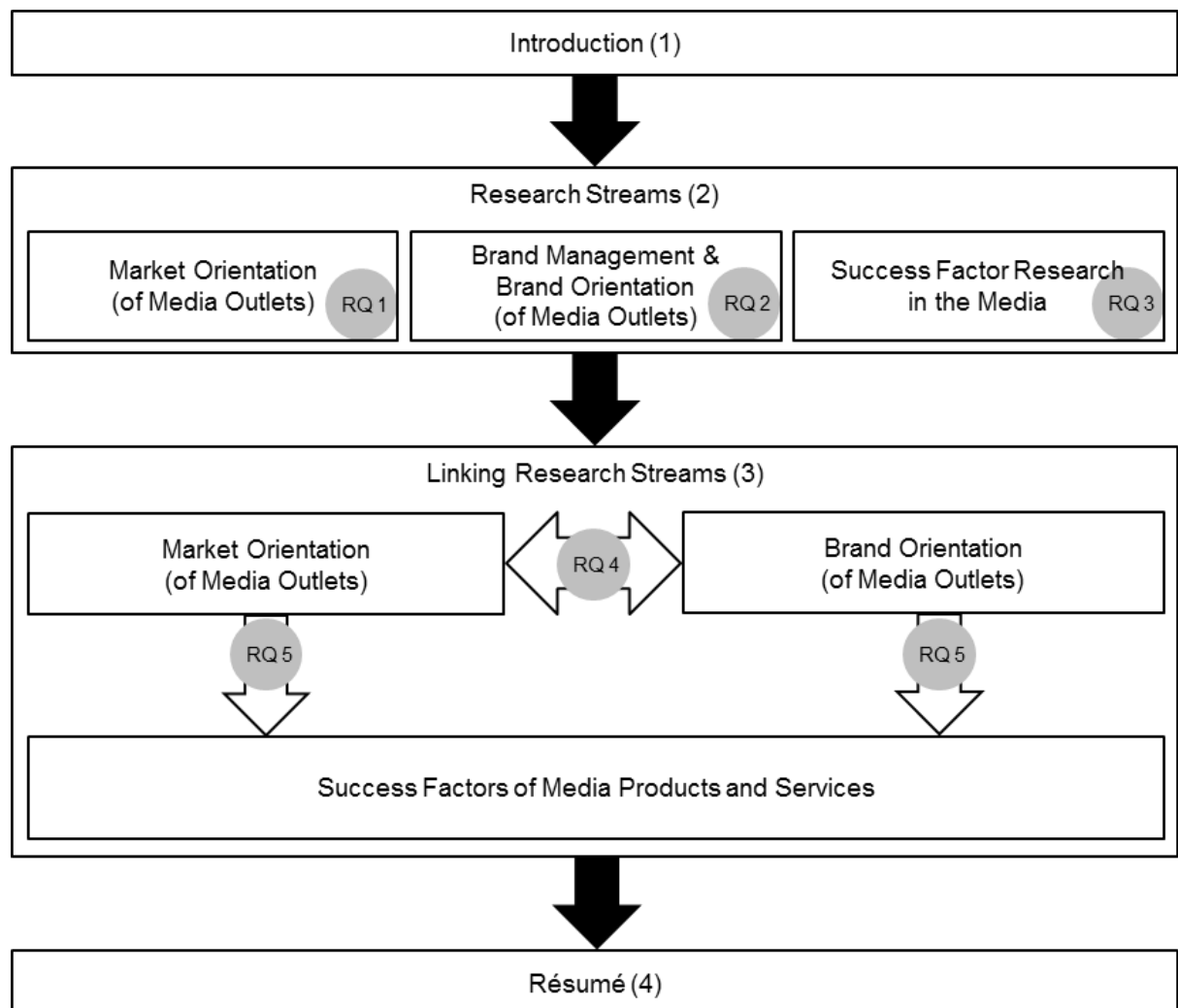


Figure 3: Structure of the synopsis

2 Research streams

The following sections briefly summarize the theoretical foundations along with the reasonings and findings of the particular papers on market orientation (2.1), brand management and its extension to brand orientation (2.2) as well as success factor research in the media (2.3).

2.1 Market orientation (of media outlets)

Market orientation has been investigated in Sommer and Krebs (2016) and Sommer (2016). It is defined as “the organizationwide *generation* of market intelligence pertaining to current and future customer needs, *dissemination* of the intelligence across departments, and organizationwide *responsiveness* to it” (Kohli & Jaworski, 1990, p. 6). Following Narver and Slater (1990), market orientation consists of the three behavioral components of customer orientation, competitor orientation, and interfunctional coordination, which are seen as important for long-term profit. Its influence is pervasive rather than restricted to specific organizational activities, making it a strategic orientation as well as an internal characteristic of the firm (Atuahene-Gima, 1996; Kohli & Jaworski, 1990; Wren, Souder, & Berkowitz, 2000). The theory stems from the dynamic capabilities approach (Day, 1994). Dynamic capabilities are “the firm’s ability to integrate, build, and reconfigure internal and external competences to address rapidly changing environments” (Teece et al., 1997, p. 516). Regarding market orientation, such capabilities include, for example, collecting knowledge of needs and processes on the customer side (Danneels, 2002; Day, 1994), learning about the competition, which involves evaluating strengths and weaknesses, as well as emerging markets and rivals (Narver & Slater, 1990; Slater & Narver, 1995), sharing the information across functions, and coordinating resources to create superior value for the customer (Narver & Slater, 1990). Multiple studies have found a positive effect or at least an indirect influence of market orientation on success (e.g., Atuahene-Gima, 1996; Bodlaj, Coenders, & Zabkar, 2012; Langerak, Hultink, & Robben, 2004; Lindbolm, Olkkonen, Mitronen, & Kajalo, 2008; Luca, Verona, & Vicari, 2010; Narver & Slater, 1990; Wong & Tong, 2012; Wren et al., 2000).

When applying market orientation to media outlets (for more details, see Sommer, 2016; Sommer & Krebs, 2016), one must consider the characteristics of media goods (Sommer, 2015), in particular, media outlets’ need to serve two groups of customers: audiences and advertisers (Wildman, 2006). The two-sided market concept points out this business model (Anderson & Gabszewicz, 2006; Gabszewicz, Resende, & Sonnac, 2015; Rochet & Tirole, 2006). One or several platforms enable interactions between end users. Changes in a first market always affect the second one, and vice versa, such as an increase

in reader demand resulting in an increase in advertising rates, while an increase in advertising demand leads to a decrease in cover prices (Kaiser & Wright, 2006). Regarding the relationship of audience market and advertising market to the competition, Kind, Nilssen, and Sorgard (2009) show that the scope for raising revenues from audiences is constrained by other media outlets offering close substitutes, while the scope for raising revenues from advertisers is constrained by how many competitors the media outlet faces.

This results in the need to adapt the market orientation model to the media, which has been applied to this two-sided market scenario in Sommer and Krebs (2016). A market-oriented media outlet generates, disseminates, and coordinately responds to market intelligence on audiences, advertisers, and competitors in order to be successful (see Figure 4). The audience market and advertising market are connected since advertisers pay for access to audiences and audiences benefit from advertisers' information and contribution to the media outlet's revenue. Depending on the business model and their importance for revenues, one group of customers is potentially favored over the other. The audience market is also connected to the competition since audiences find substitutes elsewhere and other media brands aim for the same target groups. The same holds true for advertisers and competitors. While the former may find substitutes elsewhere, the latter compete for a share of the advertising market. Overall, market orientation should positively influence a media outlet's success.

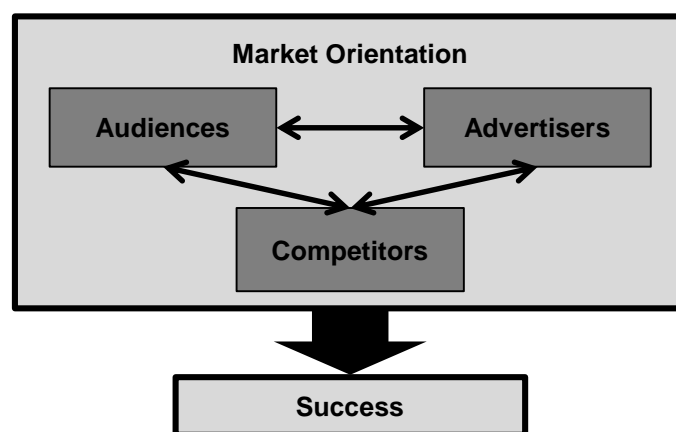


Figure 4: Market orientation of media outlets (Sommer & Krebs, 2016)

Research to date has focused on single components of market orientation in the media. Most of the studies have investigated the audience side and journalists' perceptions and have found, for instance, a positive effect of integrating the audience in innovation processes on success (Habann, 2010) as well

as senior editors from market-oriented newsrooms expressing less uncertainty about their outlet's environment and feeling more confident to be able to adapt to changes in its environment (Beam, 2001). Regarding advertisers, Habann (2010) finds their acceptance of a media innovation to be important for its success. In comparison to the competition, media outlets have to offer an advantage to their two groups of customers (Bleis, 1996). Monitoring competitors' activities has been identified as having a positive influence on the achievement of a media outlet's goals (Habann, 2010). However, a more comprehensive analysis of market orientation from a media management perspective is still missing.

Accordingly, in an exploratory study it was investigated in Sommer and Krebs (2016) whether market-oriented news outlets are more successful in terms of change of circulation. Focusing on overall market orientation, reader orientation, and competitor orientation, standardized interviews with media professionals in Denmark, France, Germany, Italy, Switzerland, and the United Kingdom ($n = 36$) are conducted and circulation data is collected. The findings suggest that market orientation in the media is different from other industries. Relationships to success are less systematic, which may be caused by mutual influences of potentially conflicting market intelligence regarding the news outlets' two groups of customers. The Directions of correlations differ depending on the type of news outlet. Dailies emphasizing reader orientation and a swift reaction to competitors' initiatives are more successful in terms of change of circulation ($r_s = 0.51$; $p < 0.05$ and $r_s = 0.43$; $p < 0.1$ respectively). For weeklies, the opposite is true. Low rating researching the readership and responsiveness to the competition are associated with success ($r_s = -0.81$; $p < 0.05$ and $r_s = -0.89$; $p < 0.05$, respectively). Regarding free dailies, the results were inconclusive (for more details and further findings, see Sommer & Krebs, 2016).

Prior studies assumed that market orientation is a key factor in times of uncertainty (Jaworski & Kohli, 1993, pp. 57–58; Li & Calantone, 1998, p. 18; Wren et al., 2000, p. 602). Accordingly, it has a positive effect on success when innovating, developing a new product/service or starting a new business (Atuahene-Gima, 1996; Han, Namwoon Kim, & Srivastava, 1998; Hong, Song, & Yoo, 2013; Wong & Tong, 2012; Wren et al., 2000). Uncertainty is a characteristic of the media industry in the course of digitalization and convergence. Hence, new products and services emerging within traditional media or in the form of startups should benefit from market orientation. However, the latter have barely received the attention of media management scholars (Achtenhagen, 2008; Compaine & Hoag, 2012; Hang & van Weezel, 2007; McKelvie & Wiklund, 2008; Naldi & Picard, 2012), despite potentially being the most innovative (Achtenhagen, 2008; McKelvie & Wiklund, 2008). Moreover, studies did not address how market intelligence about audiences, advertisers, and competitors is generated, disseminated, and coordinately responded to in detail.

Accordingly, in Sommer (2016) the processes and practices of market orientation in the media are investigated, based on case studies of *Ada*, *Go Baller*, *Formerly*, and *Upstr*, which are four early stage online news startups in the United States. In doing so, market orientation had to be specified: News startups have to generate, disseminate, and coordinately respond to market intelligence about (1) their *users* to whom they provide created, curated, and/or aggregated content, (2) *businesses* for which they offer advertising opportunities and other services as well as (3) *competitors*. As a result, market orientation should have a positive influence on their *survival*. The results show that startups generate market intelligence in various ways and, in doing so, they prioritize markets. Most of the attention is usually dedicated to learning about users through qualitative and quantitative methods such as interviews and surveys. On the advertising market, startups follow a less formal approach, mainly relying on their personal experiences and conversations. Instead, they explore alternative revenue streams, interview potential business customers, and partner with them to meet their needs. Startups also analyze the strengths and weaknesses of their competitors as well as monitor news and exchange with other startups to stay up-to-date with current trends and the competition. Overall, market orientation seems to have a positive influence on a news startup's survival: *Formerly* and *Go Baller*, which placed significant efforts into learning about and adjusting to users, businesses, and competitors, have been able to raise funding from investors and thus, are more likely to survive. More details and further results can be found in Sommer (2016).

Conclusion RQ 1:

- Market orientation of media outlets is defined as generating, disseminating, and coordinately responding to market intelligence on audiences, advertisers, and competitors.
- Market orientation is a media outlet's strategic orientation, which encompasses certain capabilities.
- Market orientation in the media differs from that of other industries and differs depending on the type of news outlet.
- In market orientation processes, the markets are prioritized. News startups focus more attention on users than business customers and competitors.
- Overall, market orientation fosters the survival of news startups. For dailies, reader orientation and a swift reaction to competitors' initiatives are positively correlated with success in terms of change of circulation. However, the correlation is negative for weeklies.

2.2 Brand management (of media outlets)

Brand management has been investigated in Sommer (2015) and Sommer and Marty (2015). Keller (2008) defines it as building, measuring, and managing brand equity. In doing so, the brand becomes a resource for the organization in its relationships with customers as well as in its internal processes (Kapferer, 2009).

Within brand management, brand identity is a well-established concept (Aaker, 1991; Esch, 2005, 2012; Meffert, Burmann, & Kirchgeorg, 2008). Based on Aaker (2010, p. 68), it can be described as a “unique set of brand associations that the brand strategist aspires to create or maintain. These associations represent what the brand stands for and imply a promise to customers from the organization.” Through the brand identity, a relationship between the brand and the customer should be established by generating a value proposition involving functional, emotional or self-expressive benefits (Aaker, 2010). Therefore, the concept of brand identity is integrating an internal (self image of the brand) and an external (public image of the brand) perspective, and their interactions. The brand’s positioning is derived from the brand identity, which is perceived by the customer through the brand image. The fit of brand identity and brand image is crucial since it determines the credibility of the brand’s positioning (Burmann & Meffert, 2005).

According to Siegert (2008), media brand management is defining and communicating what a media brand stands for. For McDowell (2006, p. 234), a media brand is “a name, term, sign, design, or unifying combination of them intended to identify and distinguish a product or service from its competitors. Brand names communicate thoughts and feelings that are designed to enhance the value of a product beyond its product category and functional value.” These definitions of brand management and media brand are not entirely different from those of other industries. However, when applying the brand identity concept to the media, media product characteristics have to be considered.

Media outlets compete in a two-sided market, serving audiences and advertisers. Accordingly, both groups of customers have a brand image. In terms of the brand identity concept, this means that media outlets must define their brand identity, from which they develop strategies for the audience as well as the advertising market. Subsequently, the media brand is perceived and a brand image amongst audiences and advertisers evolves. When compared to industries that serve one market, in addition to the fit of brand identity and brand image, the fit of audiences’ and advertisers’ brand images is important for credible positioning, as suggested in Sommer (2015; see Figure 5).

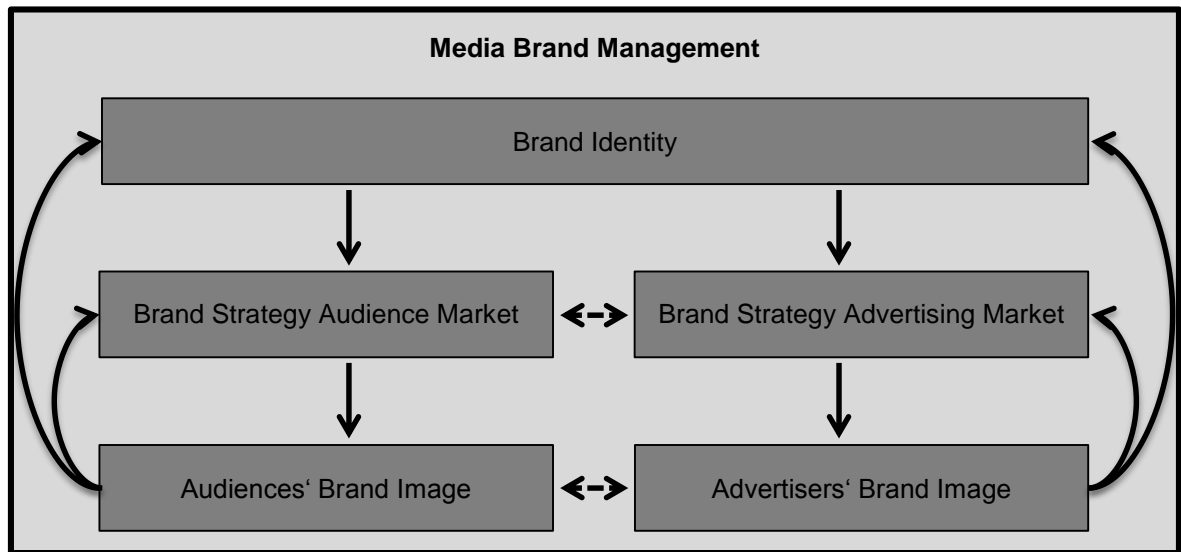


Figure 5: Media brand management (Sommer, 2015)

However, media practice and media research tend to focus on the audience side (Krebs & Siegert, 2015; Malmelin & Moisander, 2014). Little is known about media brands in the advertising market (Baumgarth, 2004b; Berkler, 2008; McDowell, 2006), despite media brands offering benefits for media outlets and advertisers alike, as outlined in Sommer (2015). Two exceptions include McDowell (2004), who identified seven different business-to-business advertising strategies of cable networks and Ots and Wolff (2008), who found that the behavioral loyalty of consumers, the attitudinal loyalty of consumers, and a well-defined target group to be the advantages of strong media brands for media planners. Hence, the perception of the media brand in the advertising market deserves further investigation.

Thus, in Sommer and Marty (2015) the importance of the media brand in media planning has been studied in more detail. Based on a standardized online questionnaire, media planners in Austria and Switzerland were surveyed (n = 99). The study found that the respondents perceive the media brand as most important when advertising for specialty goods, in the premium market segment as well as in magazines and newspapers. Following these differences, the media brand is arguably related to success in the advertising market, depending on the type of media and the advertising customer. Hence, it is suggested to develop a clear brand strategy from the brand identity, for the audience as well as the advertising market, to position a media brand in comparison to competitors and to highlight its unique selling proposition. In doing so, media organizations will be able to better exploit the potential of their brands (see Sommer & Marty, 2015 for more details and additional results).

The potential of media brands stems from them fulfilling certain functions for media outlets which help compensate for further media product characteristics such as immateriality, insecurity, external effects, and self-referentiality, as summarized in Sommer (2015). Siegert (2001) distinguishes between functions from the organization, the audience and the advertiser perspective, respectively. Focusing on the organization, the media brand allows for differentiating from the competition, boosting and stabilizing sales, attributing ad effects to products, and strengthening the position in negotiations with advertisers. In addition to these external functions, the media brand fulfills an internal role. It builds the corporate identity, facilitates decisions in selection processes as well as in buying and production, helps in recruiting and cooperations, structures program planning and audience research and secures innovation. Accordingly, the media, brands, actors, and communication model (MBAC model) suggests brand identity-driven decision making by journalists and media managers (Siegert, Gerth, & Rademacher, 2011). In Sommer (2015), it is argued that brand identity should be central to the entire organization and a point of reference for developing business models and business activities. Only then, can potential conflicts between audiences and advertisers be avoided and coherent brand strategies lead to matching brand images in both markets along with credible positioning.

This is in line with the concept of brand orientation. Urde (1994) suggests using brands as a starting point in the formulation of strategy and defines brand orientation as “an approach in which the processes of the organization revolve around the creation, development and protection of brand identity in an ongoing interaction with target customers with the aim of achieving lasting competitive advantages in the form of brands” (Urde, 1999, pp. 117–118). Correspondingly, Hankinson (2012) suggests moving from a brand strategy to a brand-based strategy. In doing so, the brand is considered a strategic resource and a hub around which the organization’s processes revolve. Brand management becomes a capability and core competence (Gromark & Melin, 2011). When investigating brand orientation’s influence on performance, scholars find a positive relationship across several industries (Baxter, Kerr, & Clarke, 2013; Gromark & Melin, 2011; Hankinson, 2012; Wong & Merrilees, 2008). The effect holds true for the business-to-business sector (Baumgarth, 2010; Baumgarth & Schmidt, 2010) as well as for non-profit organizations. The results for the latter are particularly interesting, since they follow a wider range of goals and trust plays a crucial role, similar to media companies (Ewing & Napoli, 2005; Napoli, 2006). In line with this, Baumgarth (2007; 2009b) finds a positive influence of brand orientation on success in the media. However, while brand orientation is high in terms of values and norms, deficits in artifacts and behaviors are detected.

Conclusion RQ 2:

- Brand management of media outlets means defining a brand identity and developing strategies for the audience as well as the advertising market.
- In brand management, media outlets tend to focus on the audience market.
- The media brand differs in importance for success in the advertising market, depending on the type of media and the advertising customer (type of good and market segment).
- Brand orientation considers the brand as central to the entire organization and a hub around which the processes revolve. Within this strategic orientation, brand management becomes a core competence.
- Research shows that brand orientation has a positive influence on success in the media.

2.3 Success factors in the media

Success factor research in the media has been addressed in Sommer and von Rimscha (2013), Sommer and von Rimscha (2014), and Sommer et al. (2016). The field is fairly broad and fragmented. Studies tend to focus on single types of media and a limited range of variables. Drivers of movies' box office revenue have received the most attention to date. Secondary data is widely available and frequently analyzed in regression models (Clement, 2004; Simonton, 2009). The situation for books is similar as new products are also introduced on a regular basis, which provides a wealth of data (Blömeke et al., 2007). Fewer studies have explored periodical media. New product development happens less frequently, which means a smaller number of investigatable cases. In addition, success is more difficult to define on the time line. Thus, research mostly relies on content analysis or surveys (Habann, 2010; Schönbach, 2004).

However, this technology-based conceptualization of success factor studies in the media is no longer valid. Development and production processes converge across different types of media and media outlets offer their content via multiple means of distribution (Carvajal & García Avilés, 2008; Caspar, 2002; Colapinto, 2010; Siegert, 2003). For news, it could be a printed paper, a website and mobile applications. A writer may tell a story through a book, a movie and social media. Thus, success factor research needs to adapt to these changes.

When analyzing the findings of studies in the field of success factor research, similarities between different types of media surface (Sommer & von Rimscha, 2014). Books and movies have certain success factors in common (Blömeke et al., 2007; Clement, 2004; Simonton, 2009). So do magazines and TV-

shows (Bleis, 1996; Shamsie et al., 2006; Tschörtner, 2008) as well as printed and audio-visual news (Cummins & Chambers, 2011; Schönbach, 2004). Therefore, success factors need to be brought to a level of abstraction, which makes them independent from different types of media that are based on means of distribution.

Accordingly, in Sommer and von Rimscha (2013), (1) success factors of media products and services have been identified in the literature, (2) results have been aggregated and generalized, and (3) a new systematization has been developed. The resulting meta-analysis depicts the current state of success factor research in the media and differentiates between process- and product-based success factors. Upon further condensing the research, ten building blocks of media success emerge (Sommer et al., 2016): content, design, environmental orientation, internal processes, organizational aspects, leadership, human resources, marketing, distribution, and external evaluation (see Figure 6).

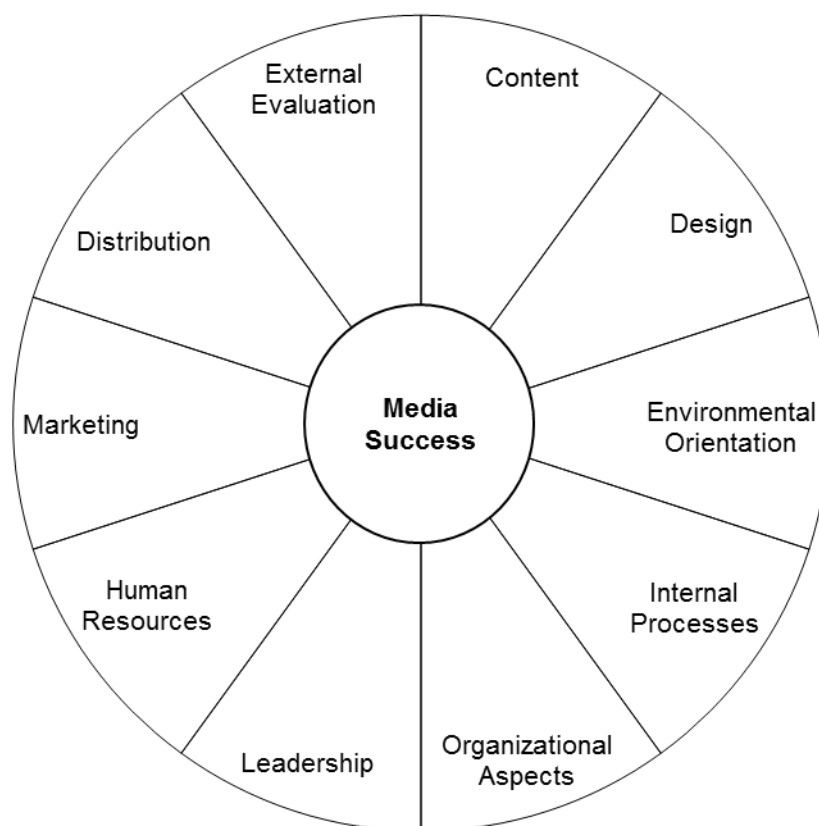


Figure 6: The Building blocks of media success (Sommer et al., 2016)

Reflecting the diminishing importance of technological means of distribution for differentiating media products and services as well as the evolving patterns in success factor research, in Sommer and von Rimscha (2014), a new approach for market demarcation and sampling is developed: the transmedia matrix. Instead of distinguishing between different types of media, it is suggested to focus on media brands in regard to the dimensions of seriality and content (see Figure 7). A media brand is a unique environment, independent from a means of distribution. Seriality (one-off to continuous production) defines production processes and it is closely related to media brands being experience goods. Content (information to entertainment) determines which resources are needed and which needs have to be served. These two dimensions are particularly important to determine substitutes and competition in times of digitalization and convergence, as they are independent from types of media and can be related to capabilities and competencies.

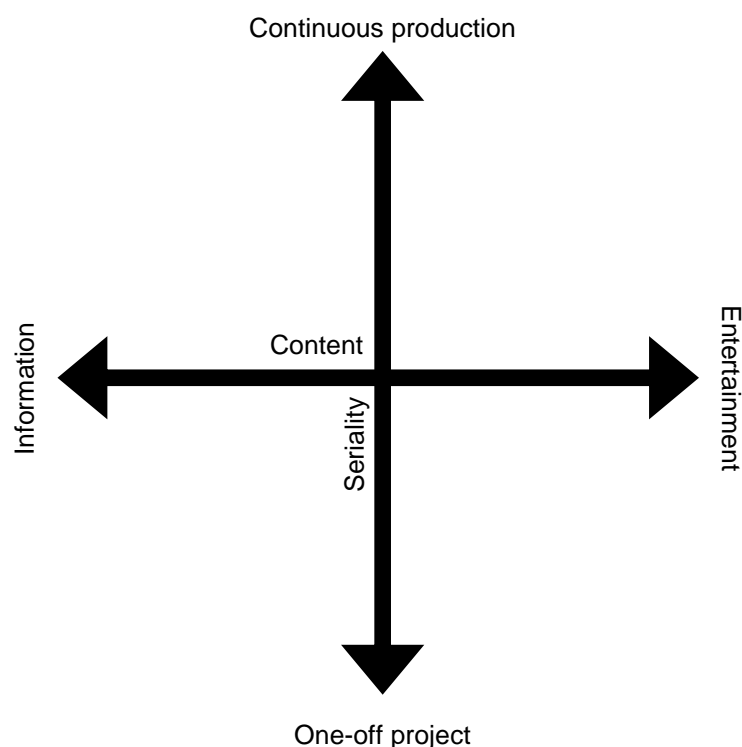


Figure 7: The transmedia matrix (Sommer & von Rimscha, 2014)

The suggested dimensions of seriality and content to distinguish media brands can be applied in success factor research. Basing the sampling on the transmedia matrix allows to clarify whether the generalization of success factors across means of distribution and types of media is feasible, and whether the ten building blocks of success can be empirically supported.

In doing so, in Sommer et al. (2016), 39 interviews with media professionals in Austria, Germany and Switzerland across 20 media brands were conducted between November 2014 and March 2015. Overall, the interviewees had no problems relating the building blocks of media success derived from the literature to their context. On an abstract level, they can be transferred to and adapted for different media brands. However, the relevance of media technology prevails in the contexts of distribution and—to some extent—marketing. Instead of focusing on distinguishing traditional types of media, it was expected that pronounced similarities and differences would be found between media brands along the two dimensions of seriality and content. However, no strong patterns evolved in the results. Certain aspects of the ten building blocks of media success are formed differently to some extent. For instance, the interviewees emphasized one aspect over another (e.g., quality for information vs. authenticity in entertainment) or they had slightly different interpretations (e.g., getting the timing right refers to the perfect time slot in television and the best release date for a book). On the contrary, the study found that media brands and their building blocks of success are converging, even when distinguished in terms of seriality and content. This shows through one-off media brands building on pre-existing teams and employees who have previously worked together successfully. Entertainment orientation and gamification in news development and production are examples regarding the content dimension. In addition, a third dimension seems to have an influence on the formation of building blocks of success: the maturity of the media brand. For instance, younger media brands tend to think of potential revenue streams and social media strategies from the beginning, while it is only an afterthought for traditional media. However, the latter are trying to catch up and adapt, which illustrates the convergence on this dimension. Therefore, the study concludes that the building blocks of media success are applicable across the media industry. It is argued that they function as hygiene factors representing industry standards and constraints to failure. The building blocks of media success independent from the types of media are particularly important in a transmedia environment, since the focus shifts away from technical means of distribution to capabilities and competencies. More details and further results can be found in Sommer et al. (2016).

Conclusion RQ 3:

- Success factor research is a broad and fragmented field in which studies focus on drivers of various performance measures for certain types of media.
- In media practice, technical means of distribution become less relevant for market demarcation compared to media brands since development and production processes converge. Media brands can be distinguished based on two dimensions: seriality and content.
- When analyzing the findings of success factor research, common patterns across different contexts evolve, which can be depicted in the ten building blocks of media success: content, design, environmental orientation, internal processes, organizational aspects, leadership, human resources, marketing, distribution, and external evaluation.
- Building blocks of media success are clusters of success factors, which are applicable across different media brands. However, differences in their design can be detected.
- Knowledge of universal building blocks of media success becomes more important in a transmedia environment since they are related to capabilities and competencies, which are also independent of the means of distribution.

3 Linking research streams

The following section focuses on the relationship between market orientation and brand orientation (RQ 4) and the influence of the two strategic orientations on success factors in the media (RQ 5). After reviewing the literature (3.1), the method is described (3.2). Subsequently, the results are presented (3.3) and discussed (3.4). Finally, the limitations and implications for further research are pointed out (3.5) and conclusions are drawn (3.6).

3.1 Literature review

Market orientation and brand orientation are resources, capabilities, and core competencies for an organization (Urde, 1999). Originally, a cultural and a behavioral perspective were distinguished. While the former defines market orientation and brand orientation as a mindset and corporate culture of the organization, the latter focuses on concrete instruments, tools, and behaviors. However, the two conceptualizations share many underlying concepts (Noble et al., 2002) and they are very similar in their operationalization (Cadogan & Diamantopoulos, 1995). As a result, they have been combined in more recent studies (Baumgarth, 2009a; Bridson & Evans, 2004; Homburg & Pflessner, 2000). When applying the strategic orientations to media outlets, differences to other industries as well as within the industry have to be considered. They have been related to success in the media, however, looked at in isolation.

When contrasting market orientation and brand orientation, Baumgarth, Merrilees, and Urde (2011) emphasize the former as focusing on the customer while the latter places brand identity at the center of the organization. This goes hand-in-hand with an outside-in and inside-out perspective, respectively. Market orientation translates into behaviors such as customer relationship management and customization. For brand orientation, these are internal branding and integrated communication. In terms of metrics, amongst others, customer satisfaction and brand equity can be distinguished (see Table 2 and Figure 8 for more details). Gromark and Melin (2013, p. 1117) argue that “it is important to differentiate between market and brand orientation not only from a theoretical perspective, but also from a managerial point of view, as managers might otherwise dismiss a powerful tool as irrelevant.” Consequently, market orientation and brand orientation are described as two strategic orientations encompassing different corporate cultures, tools, and instruments as well as controlling systems. However, both can be defined as a continuum rather than a dichotomous construct (Hankinson, 2001a), since different degrees of market orientation as well as different degrees of brand orientation are

possible. This results in the need to decide on one of the two strategic orientations or to negotiate between them and to determine the emphasis and the balance appropriately in order to be successful (Baumgarth et al., 2011; Urde, Baumgarth, & Merrilees, 2013).

Table 2: Contrasting market orientation and brand orientation (Baumgarth et al., 2011; Baumgarth & Schmidt, 2010)

	Market Orientation	Brand Orientation
Values	<ul style="list-style-type: none"> - Customer needs are the reference for all management decisions - Customer value and customer loyalty - Low stability because of continuous adaptations to changing customer needs - Customer satisfaction - Outside-in perspective 	<ul style="list-style-type: none"> - Brand is the reference for all management decisions - Brand value and brand identification - Continuity - Uniqueness - Inside-out perspective
Norms	<ul style="list-style-type: none"> - Satisfaction of customer needs - Powerful key account manager 	<ul style="list-style-type: none"> - Satisfaction of brand identity - Powerful brand manager
Artifacts	<ul style="list-style-type: none"> - Stories about special efforts to satisfy customer needs - Architecture of buildings and trade stands is open and easily understandable for customers 	<ul style="list-style-type: none"> - Stories about consistently following the brand identity - Architecture of buildings and trade stands communicates the brand
Behaviors	<ul style="list-style-type: none"> - Customer-based controlling - Educating employees - Adaptive/personalized marketing 	<ul style="list-style-type: none"> - Brand-based controlling - Educating employees about the brand - Consistent/integrated marketing

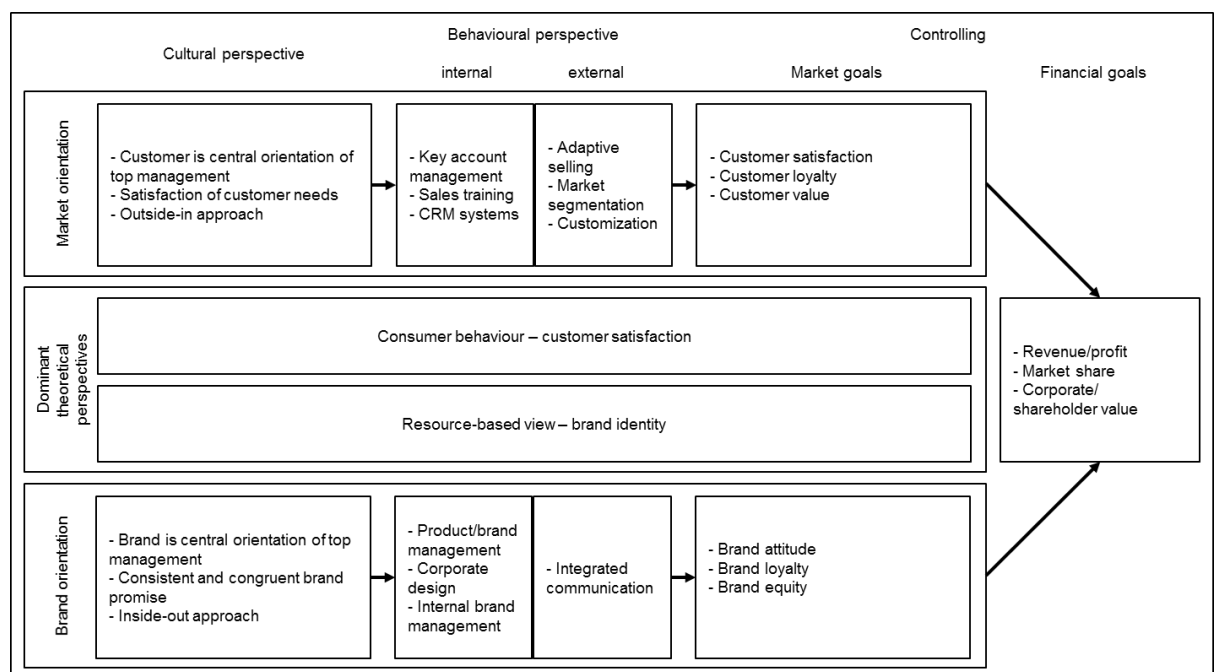


Figure 8: Differences between market orientation and brand orientation (Baumgarth et al., 2011)

Scholars disagree regarding the relationship of the two strategic orientations. While market orientation theory is well established, brand orientation is a comparably new and still emerging concept (Baumgarth, Merrilees, & Urde, 2013). The latter was originally developed as a response to the former. It called into question common statements such as “the customer is always right” and “everything for the customer,” and addressed the shortcomings. By criticizing an unconditional response to customer’s wants and needs, it is argued that they must not be ignored, but they should not be the only drivers of an organization. Prioritizing the brand not only gives it integrity in relation to the customers’ wants and needs and the actions of competitors but also in internal strategic processes (Urde, 1999; Urde et al., 2013). Gromark and Melin (2013) examined brand orientation as an alternative to market orientation. They argue that the latter’s focus on customers is too great, making it myopic, mechanistic, lack true interaction, and overemphasize economic values. Brand orientation, on the other hand, is seen as more powerful based on three reasons: (1) It provides a holistic and balanced perspective on an organization, diminishing the risk of focusing on customers too much, which leads to myopia; (2) it is more robust as it emphasizes continuity coupled with dynamics and interaction, diminishing the risk of short-sightedness and reactivity; and (3) it allows for considering values other than economic ones. However, most studies see them as related constructs and discuss hybrid forms. Noble et al. (2002, p. 28) define brand orientation as an “additional, important dimension” to the market orientation framework because of successful branding’s need for an understanding of customers, competitors, and organizational processes. Following Reid et al. (2005), market orientation and brand orientation are partly overlapping concepts, each vital to the fulfillment of organizational objectives and interlinked since customer orientation is central in both orientations. In addition to the customer, they are concerned with brand identity and integration. Other studies argue that market-oriented organizations are more likely to possess strong brands since the intelligence created about the brand via the customer is valuable (Ahmad & Iqbal, 2013; Mulyanegara, 2011; O’Cass & Viet Ngo, 2007). Reijonen, Laukkanen, Komppula, and Tuominen (2012) find that growing small- and medium-sized enterprises are more market orientated and brand oriented than declining and stable firms. Most recently, Urde et al. (2013) discussed the interactions between brand orientation and market orientation, suggesting a dynamic view in which their balance can evolve and change over time. Accordingly, negotiating between the two strategic orientations is necessary. In doing so, organizations can be market-oriented, brand-oriented, market- and brand-oriented, or brand- and market-oriented. The latter two options prioritize one orientation over the other. Market and brand orientation is associated with a strong dose of branding added to a very strong market focus. Brand and market orientation encompasses a strong

dose of market focus added to a very strong brand emphasis. Furthermore, it is argued that an organization potentially comprises brands with differing strategic orientations.

Remarkably, these fundamental issues have not been addressed in the media in any empirical study to date. However, a few arguments and findings from culture (Baumgarth, 2009a), nonprofit (Ewing & Napoli, 2005; Hankinson, 2000, 2001a, 2001b, 2002; Mulyanegara, 2011; Napoli, 2006; Rodriguez Cano, Carrillat, & Jaramillo, 2004; Shoham, Ayalla, Vigoda-Gadot, & Schwabsky, 2006), and public (Gromark & Melin, 2013) contexts are interesting since these organizations also follow a wider range of goals and they do not solely focus on economic values. Regarding the nonprofit sector, it is suggested that market orientation has a greater effect on performance compared to the private sector. While the practice is not particularly widespread in the former, it has been used more and for much longer in the latter. Therefore, it has become a hygiene factor and industry standard, respectively (Rodriguez Cano et al., 2004; Shoham et al., 2006). Likewise, professionalization regarding market orientation in the media lags behind other sectors (Usher, 2013). However, Gromark and Melin (2013) believe that market orientation primarily focuses on the benefits to individuals and it does not fulfill a public-sector organization's *raison d'être*; that is, its contribution to the common good. Brand orientation, on the other hand, allows for qualities that are crucial from a democratic perspective; that is, the ability to create trust. The brand's implicit promise provides a tool for evaluating democratic institutions for citizens. This argument does not hold true for all media outlets, but it is definitely valid for public service media which have to create value for society (von Rimscha & Siegert, 2015). Also Baumgarth et al. (2013) state that brand orientation is particularly important for firms characterized by motives that go beyond the satisfaction of customers' wants and needs. Thus, it is argued that the brand should be placed at the center of an organization and its processes, especially in the nonprofit sector (Hankinson, 2000; Napoli, 2006). Regarding museums, brand management is suggested as one building block available for further professionalization when operating in a challenging economic environment (Baumgarth, 2009a). However, its adoption has been met with resistance by cultural institutions. Similarly, the application of practices from the world of commerce in the media industry poses challenges (Lampel et al., 2000; Siegert, 2002). In line with these findings, Baumgarth (2007; 2009b) identifies deficits in artifacts and behaviors regarding brand orientation in the media.

Overall, there are very few studies examining market orientation and brand orientation conjunctively. None of these investigate the two strategic orientations in the media. Merging presented theories and findings, market orientation and brand orientation need to be negotiated in relation to audiences, advertisers, and competitors, who are connected (Sommer & Krebs, 2016). According to market

orientation's outside-in perspective, market intelligence is generated and disseminated throughout the media outlet. In internal processes, it is evaluated based on and coordinated with the brand identity, which is the inside-out perspective of brand orientation. Subsequently, the media outlet responds with the resulting strategy. Depending on a media outlet's business model and positioning, market orientation and brand orientation are of different importance (Sommer & Krebs, 2016; Sommer & Marty, 2015). Consequently, emphasizing and balancing the two strategic orientations appropriately has a positive influence on success.

In addition to the lack of research on the relation of market orientation and brand orientation in the media, the two strategic orientations have not been put into context with success factors in the media. Despite their different foci, both concepts argue for an organization-wide approach (Baxter et al., 2013). In doing so, they are no longer tactical tools owned by the marketing department, but instead, they are mindsets, cultures, and strategic resources, which are foundational to and permeate the entire organization (Gromark & Melin, 2011; Narver & Slater, 1990; Reid et al., 2005; Urde, 1999). Thus, they should also influence the building blocks of media success (Sommer et al., 2016), as depicted in Figure 9.

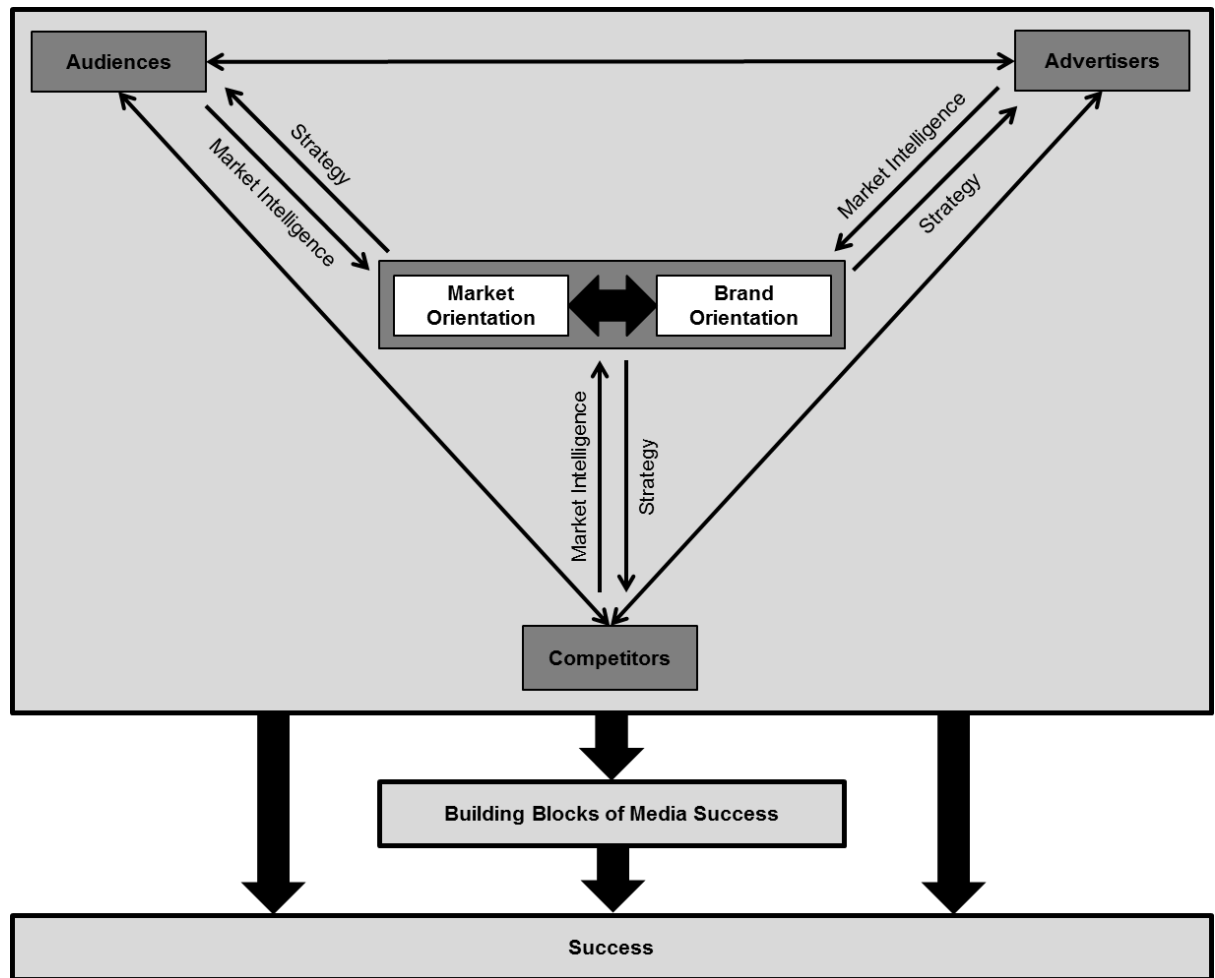


Figure 9: Market orientation and brand orientation in the media in their relation to the building blocks of success

Based on this literature review, research question four and research question five are specified:

- How are market orientation and brand orientation emphasized and balanced in the media? (RQ 4)
- How are market orientation and brand orientation related to the building blocks of media success? (RQ 5)

3.2 Method

To answer the research questions, transcripts of the semi-structured, in-depth interviews with media professionals in Austria, Germany and Switzerland were analyzed (Sommer et al., 2016). The interviews focused on the relevance of success factors derived from the literature as well as additional factors, which had not been covered. The interview guidelines were customized for every media

professional based on supplementary desk research regarding the interviewee's professional background and the media brand that they were engaged with. Accordingly, the respondents were asked to refer to the media brand in question as well as their experience in other projects when assessing and elaborating on the importance of the success factors.

For coding the transcripts, the literature review of success factor research in the media and the interview guidelines served as a framework (Simons, 2009), while remaining open for further themes emerging from the data. In addition, key points regarding the ten building blocks of media success were summarized.

In the analysis, two paths were followed: First, parts of the transcripts related to market orientation and brand orientation were examined, essentials for every interview were summarized and emerging patterns were extracted. Second, the case summaries were evaluated and building blocks of media success were ranked. In doing so, the emphasis, specificity, and scope of the interviewees' descriptions were considered. This approach enables coping with the extensive material and gaining a better sense of the emphasis on and the balance between market orientation and brand orientation as well as their relationship with the building blocks of media success. In the following, the two streams are merged to cross-validate and strengthen the results. Throughout the analysis, the original material was consulted multiple times to further improve the findings.

This qualitative, exploratory approach is particularly suitable as a first attempt to investigate market orientation and brand orientation as well as their influence on the building blocks of media success. As the research to build on is extremely limited, and the processes and relationships can be examined in more detail compared to a standardized method. Strictly speaking, the analysis of in-depth interviews only allows assessing success factors as they are perceived by interviewees. However, since the "true" drivers of success are not accessible, the accounts of the involved individuals serve as suitable proxies.

The sampling process of the study reflects the idea that technological characteristics are no longer a valid distinction in media practice. Consequently, our case selection for the interviews was brand based. Media brands, being a unique environment, which is independent from a means of distribution, can be distinguished depending on their seriality and content. These two dimensions are particularly important to determine substitutes and competition in the digital era (Sommer & von Rimscha, 2014). Seriality defines production processes and it is closely related to media brands being experience goods. Content determines which resources are needed and which needs have to be served. To select the brands, it is distinguished between one-off, multi-part, and continuous production in terms of seriality, and information, infotainment, and entertainment in terms of content. Based on trade press coverage,

a list of more than 50 successful and unexpectedly unsuccessful media brands was developed. In doing so, the criteria balance, variety, and opportunity to learn were considered as suggested in the literature (Stake, 1995). Media brands should be equally distributed across the dimensions of seriality and content. Moreover, they should vary in terms of audience size and maturity to meet the criteria balance and variety. In addition, media coverage must emphasize something special about the brand, such as using multiple means of distribution or being very traditional, to ensure the opportunity to learn. To gain a better picture of every brand, three media professionals to cover development, production, and marketing aspects should be interviewed. Overall, 39 interviews across 20 media brands were conducted between November 2014 and March 2015 (see Table 3). The interviews were informal in nature and they lasted between 36 and 128 minutes. They were recorded and subsequently transcribed. Despite these efforts, this study remains qualitative and exploratory in nature and it does not claim representativeness.

Table 3: Media brands and interviews

Brand	Country	Interviews	Description	Content	Seriality
2012	AT	2	End of the world	Infotainment	Multi-part
Anno 1914	CH	2	History and fiction	Infotainment	Multi-part
Bestatter	CH	2	Fiction	Entertainment	Multi-part
Clixoom	DE	1	Explainers	Infotainment	Continuous
Das grosse Los	DE	2	Travel	Entertainment	One-off
Der Koch des Königs	CH	2	Portrait	Entertainment	One-off
Echo der Zeit	CH	3	News	Information	Continuous
Fack ju Göhte	DE	1	Fiction	Entertainment	One-off
FernOst	DE	2	Documentary	Infotainment	Multi-part
Jassen	CH	1	Game show	Entertainment	Continuous
Jung & Naiv	DE	1	Political interviews	Information	Continuous
Kastelau	CH	1	Fiction	Infotainment	One-off
Landlust	DE	1	Nature	Infotainment	Continuous
Puls 4 Wahlarena	AT	3	Political discussion	Information	Multi-part
SF DOK	CH	3	Documentary	Infotainment	Continuous
Tag und Nacht	CH	4	Fiction	Entertainment	Continuous
Tagebuch der Arabischen Revolution	AT	2	News about historical event	Information	One-off
The Voice	DE	1	Casting	Entertainment	Multi-part
Watson	CH	2	News and entertainment	Infotainment	Continuous
Wien Tag und Nacht	AT	3	Scripted reality	Entertainment	Continuous

For a better understanding of these 20 media brands in terms of our selection criteria seriality and content, they have been plotted in a matrix (see Figure 10). Following the idea of fading importance of technological characteristics, the visualization illustrates competition in the digital era being independent from primary means of distribution. Similarities and differences between media brands should be detected along the suggested dimensions of seriality and content.

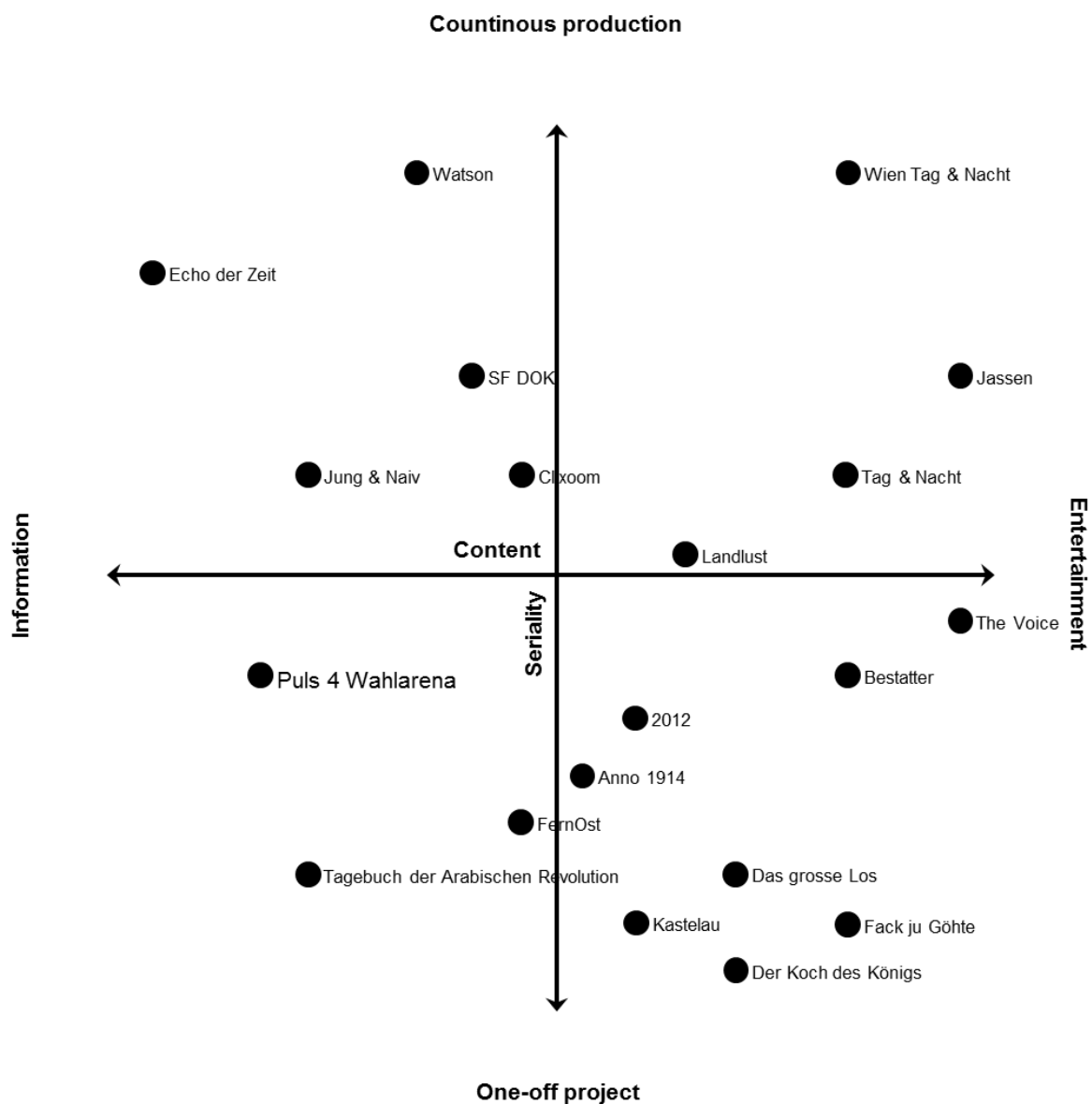


Figure 10: Visualization of media brands, depending on seriality and content

When designing and conducting the study, quality criteria of qualitative research were considered carefully (Yin, 2009). To enhance reliability, the steps and processes to be followed whilst interviewing the media professionals and analyzing the transcripts were defined. In terms of construct validity, supplementary desk research was conducted and up to three media professionals per case should be interviewed. Internal validity was enhanced through alternative methods of analyzing the data such as cross-brand pattern matching and explanation building. External validity was supported by examining a diverse range of media brands and basing the guidelines for data collection and analysis on a thorough literature review.

3.3 Results

The subsequent sections present the results for research question four and research question five. The first section summarizes the findings regarding market orientation (in relation to audiences, advertisers, and competitors) and brand orientation (internal and external relevance) as well as their emphasis and balance (RQ 4; Section 3.3.1). The second section highlights the two strategic orientations' relation to the building blocks of media success and their relative importance (RQ 5; Section 3.3.2).

3.3.1 Emphasis and balance of market orientation and brand orientation

When investigating **market orientation**, the transcripts show that most media brands considered audiences and their needs at least to some extent to be successful. For some, they were the primary point of reference: *"The audience decides. I only pay attention to what the audience does. When do they leave? What are they commenting? What are they liking?"* (Clixoom). Similarly, for Watson, it was *"legitimate to provide what the audience wants."* Continuous interaction with and integration of audiences was considered to be important (Anno 1914, Clixoom, Jung & Naiv, Puls 4 Wahlarrena, The Voice, Watson, Wien Tag & Nacht). Other brands emphasized tailoring their contents to audiences such as making them understandable and highlighting their relevance (Anno 1914, Bestatter, Das grosse Los, Echo der Zeit, FernOst, Kastelau, Landlust, Puls 4 Wahlarrena, SF DOK, Watson, Wien Tag & Nacht). Many interviewees stressed local orientation being important for success, such as Jassen, which emphasized producing local programs. For Wien Tag & Nacht, being Austrian was a core value. Despite the focus on audiences, generating market intelligence through market research played a minor role for most brands. It was often performed irregularly (Bestatter, Jassen, Kastelau) or by *"someone"* within the organization apparently without comprehensively disseminating the information (SF DOK). Some interviewees

viewed market research critically (*Jung & Naiv, SF DOK, Tag & Nacht, Tagebuch der Arabischen Revolution, The Voice, Wien Tag & Nacht*). According to Jassen, “You cannot just look at what people say, because sometimes they are overwhelmed when they are watching a new program or you find discrepancies between what they say and what they actually watch.” At 2012, criticism of market research went even further: “Market research kills ideas.” *Echo der Zeit*, on the other hand, admitted knowing little about the audience and being reluctant to influences. For *Tag & Nacht*, which was discontinued after only one season because of disappointing ratings, one interviewee concluded that “We showed it to the wrong audience at the wrong time.”

For the media brands investigated, advertisers were considered less thoroughly. Few interviewees stated that it was important for them to create an environment in which advertisers are gladly presenting their products and services (2012, *Wien Tag & Nacht, The Voice*). Others saw advertisers as partners with whom they cooperate (*Jung & Naiv, Watson, Wien Tag & Nacht*). Consequently, the media brands were actively pitching to agencies and trying to acquire advertisers’ support and money (2012, *Bestatter, FernOst, Landlust, Wien Tag & Nacht*). For 2012, “It’s a dialog. There are products which we would never promote in our magazine, because they don’t fit and would harm our credibility.” For certain brands, advertising was a difficult topic because of the project context’s restrictions (2012, *Bestatter, SF DOK*).

Regarding competitors, most of the media brands monitored the market. For example, *Landlust* watched similar titles: “We study what they are doing, who their advertising customers are and what their audience looks like.” The interviewees also attempted to learn from others (*Koch des Königs*) and looked for inspiration (*Bestatter, FernOst, Puls 4 Wahlarena, Tagebuch der Arabischen Revolution*). However, they stressed that this was done rather informally. Similar to market research on the audience side, for some media brands “someone” within the organization was monitoring the competition. The vague statements again indicated that market intelligence was not comprehensively disseminated (*Anno 1914, Jassen, SF DOK*). For licensing deals, experiences from other markets were valuable (*The Voice, Wien Tag & Nacht*). The interviewees also emphasized that it was important for new media brands, in particular, to distinguish themselves from the competition in order to be successful (*Watson, Wien Tag & Nacht*). At the same time, new media brands teamed-up with other players to learn from them (2012, *Bestatter, Clixoom, Jung & Naiv, Watson*). Descriptions of actions taken in response to competitors were rare. One exception was *The Voice*: “What’s special is that we broadcasted the whole season on two stations to avoid an attack of our rival.” *Wien Tag & Nacht*, on the other hand, did not take the competitive landscape into account sufficiently since “There was a market which had already been taken by similar products.” As a result, their ratings were disappointing, leading to a new time slot and the program being discontinued.

Brand orientation and brand identity were described more implicitly. The interviewees emphasized the importance of values regarding their work (*Koch des Königs*, *The Voice*). At 2012, they were most pervasive: *"We have certain values on which we base our actions and with which our products have to be in line. They are the foundation for sustainable success. We don't make magazines only to make money, because then we would publish different magazines. Our idea, our philosophy is that we have a message, we have something to say which is of importance for society."* Similarly, *Jung & Naiv* would decide against something that was interesting from an economic point of view: *"In conflict with the values we stand for, there are certain lines we do not cross and certain needs we do not cater to."* The interviewees assumed that this approach paid off in the long run and created *"sustainable success"* (2012). Other media brands highlighted their focus on the original idea (2012, *Anno 1914*, *Das grosse Los*, *Fack ju Göhte*, *FernOst*, *Kastelau*, *Koch des Königs*) and the importance of a mission statement and guidelines (2012, *Echo der Zeit*, *Koch des Königs*, *SF DOK*). For *Jassen*, *"Quality management is very important because it is the only way to measure whether you are providing the level of quality you want to provide as a professional."* Many other brands emphasized their own standards and high quality. At *Puls 4 Wahlarrena* for example, *"The requirement of high quality is rooted in our team and based on the organization's expectations."* Interviewees also pointed out that their media brands stood for a certain style (*Echo der Zeit*, *Jung & Naiv*, *Watson*). While some tried to focus more on their core (*Echo der Zeit*, *SF DOK*, *Tagebuch der Arabischen Revolution*), others identified the contradictions and variations in their own products and services as problematic (*Clixoom*, *Jung & Naiv*, *Koch des Königs*, *Puls 4 Wahlarrena*, *Tagebuch der Arabischen Revolution*, *Watson*). Again, *Tag & Nacht* lacked brand identity and brand orientation: *"Directors and authors had different visions. They were not merged. That was the problem."*

Some interviewees pointed out using the media brand as a tool in the audience market in order to be successful. For example, *Echo der Zeit* stated *"The brand should be highlighted more in external communication."* For the image, reputation, credibility, and trust were important (*Echo der Zeit*, *Koch des Königs*, *Puls 4 Wahlarrena*, *SF DOK*). At *Bestatter*, *"We don't only look at ratings. Our mission is also reputation. We have to be a flagship series."* The media brands also highlighted the importance of being reliable for the audience (*Bestatter*, *Clixoom*, *Koch des Königs*, *SF DOK*), which is another aspect that *Tag & Nacht* lacked in its failure. Reliability was closely connected to the question of continuity versus change and innovation. The interviewees built on proven concepts while continuously working on their improvement through small adaptations (*Jassen*, *Puls 4 Wahlarrena*). For many media brands, a fit with the organization's brand was expected to foster success.

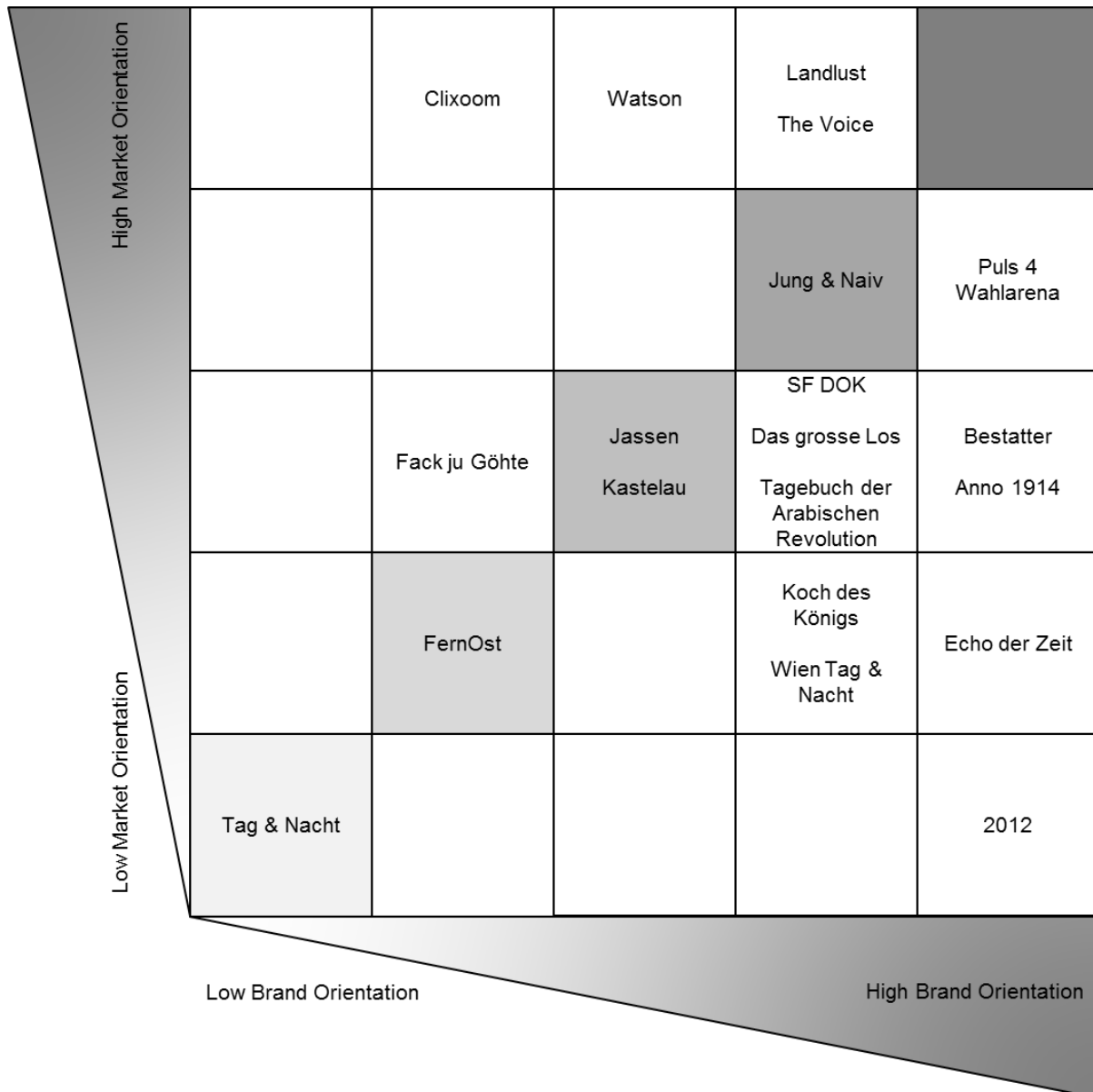


Figure 11: Emphasis and balance of market orientation and brand orientation

When looking at the emphasis, specificity, and scope of interviewees' descriptions of the elements of market orientation and brand orientation regarding their **balance**, the two strategic orientations were either equally important or one was favored over the other. At the same time, different levels along the respective continuum of market orientation and brand orientation were detected (see Figure 11). They were equally important for *Tag & Nacht*, *FernOst*, *Jassen*, *Kastelau*, and *Jung & Naiv*. While the two strategic orientations were of little relevance for *Tag & Nacht*, at *Jung & Naiv*, significant emphasis was placed on them. For *Fack ju Göhte*, *The Voice*, *Landlust*, *Watson*, and *Clixoom*, market orientation was more dominant than brand orientation. *Landlust* highlighted the connection of the two strategic orientations:

"It is very important to keep quality very high. This goes hand in hand with our reader orientation. We want to provide our audience with high quality content." At *Clixoom*, market orientation was most explicit. *SF DOK*, *Das grosse Los*, *Tagebuch der Arabischen Revolution*, *Koch des Königs*, *Wien Tag & Nacht*, *Puls 4 Wahlarena*, *Bestatter*, *Anno 1914*, *Echo der Zeit*, and *2012* were more brand-oriented than market-oriented. Again, the relation of the two was highlighted: *"In my opinion, public broadcasting needs to reach as many people as possible. My task is always at the limits of how much entertainment is possible without covering the importance of an issue"* (*Anno 1914*). Overall, *2012* showed the strongest brand orientation.

3.3.2 Relation of the strategic orientations and the building blocks of media success

Content was most important throughout the interviews. The respondents related it to both market orientation and brand orientation. For *Clixoom*, the audience decided, while *Watson* tried to offer what the audience was interested in. *Landlust* saw itself as first and foremost reader-oriented. However, the other interviewees emphasized offering content that they found important (*Tagebuch der Arabischen Revolution*), content they considered to be a "gem" (*Das grosse Los*) or content they simply wanted to cover (*FernOst*). Also at *2012* the focus was on the brand rather than the audience.

In terms of design, the media brands were more brand-oriented. This was illustrated by *Bestatter*, *Puls 4 Wahlarena*, and *SF DOK* consistently pursuing their creative concept. For *FernOst*, integrating and interacting with the audience was in conflict with the high production value that they wanted to achieve. The other interviewees claimed that their media brand could belong to a different organization; however, as one sees and feels its culture, it would thus look differently (*Anno 1914*, *Bestatter*, *Wien Tag & Nacht*). Another example of brand orientation was decisions regarding the title and visualization of fictional stories made by the author (*Kastelau*).

Environmental orientation was influenced by market orientation. The media brands monitored their competitors to find inspiration as well as ideas for innovation (*Echo der Zeit*). The interviewees emphasized the importance of being different and avoiding markets that were already taken (*Tagebuch der Arabischen Revolution*, *Wien Tag & Nacht*). Many also highlighted local orientation, which allowed them to distinguish themselves from foreign media brands and appeal to domestic audiences.

For internal processes, brand orientation dominated. *2012* and *Jung & Naiv* emphasized the importance of their values in their work. *Wien Tag & Nacht* focused on their experience and proven processes. *Landlust* being the market leader also highlighted their approach. For *Jassen*, quality management was

very important. Another interviewee stated that “*You develop a routine which matches the media brand*” (*Koch des Königs*).

The interviewees also related organizational aspects mostly to brand orientation. Most of the interviewees stressed how organizational culture impacted their work. *Wien Tag & Nacht* illustrated a media brand being adapted for its new context. Others highlighted how the media brand shaped the organization. A signature format like *The Voice* stands for a broadcasting station. Similarly, having a startup within the media house can have a positive effect on the entire organization (*Watson*).

Leadership was rarely discussed throughout the interviews. However, when brought up, it was connected to brand orientation. According to the interviewees, leaders stand for certain values (2012, *Watson*) and they decide on projects that they find important rather than commercially impactful (*Tagebuch der Arabischen Revolution*).

Consequently, also in human resources, brand orientation was influential. Everyone must be committed to and share a common understanding of the project (*Fack ju Göhte*, *SF DOK*, *Wien Tag & Nacht*). For *Anno 1914*, convincing everyone internally and acting in concert was seen as beneficial for the media brand. At *Puls 4 Wahlarrena*, a strong group identity was viewed as important and present. At *Echo der Zeit*, the media brand was considered as “*Maybe even too strong for new employees as they adjust too much and copy what has been done before.*”

Marketing was influenced by market orientation and brand orientation. Most of the media brands conducted market research to some extent and catered to the needs of their audiences. However, the interviewees also emphasized the importance of their positioning and marketing efforts being well coordinated and in line with the media brand. For example, at *Bestatter*, the director of the series was also responsible for its advertising.

Distribution was dominated by market orientation. Media brands attempted to adjust to audiences’ changing consumption patterns (*Echo der Zeit*, *Puls 4 Wahlarrena*, *Tag & Nacht*). At *Watson*, the interviewees highlighted input and feedback they received from users about different versions of an app in order to improve their means of distribution.

For the external evaluation of the media brand, market orientation and brand orientation played a role. While the former was important to generate market intelligence on the image amongst the audience, the latter focused on influencing how the media brand was perceived. In doing so, the interviewees pointed out that they focus on reputation (2012, *Bestatter*, *Puls 4 Wahlarrena*).

When looking at the emphasis, the specificity, and the scope of the interviewees' descriptions regarding the building blocks of media success, content was the most important. Human resources, design, and marketing were also considered to be influential. The same was true for distribution, but to a lesser extent. Organizational aspects, internal processes, and environmental orientation appeared not as valuable. The interviewees assessed external orientation and leadership to be least important. The relative importance of the building blocks of media success and their relation to market orientation and brand orientation is depicted in Figure 12.

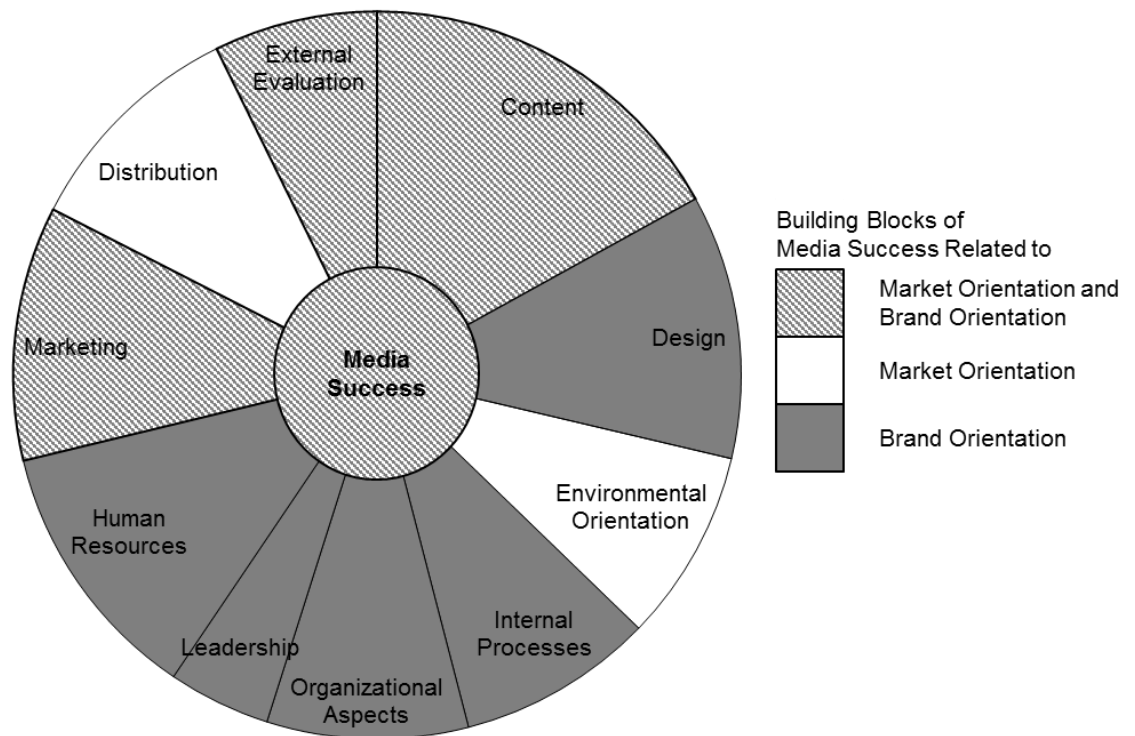


Figure 12: Relation of the strategic orientations and the building blocks of media success

In the following, the results regarding market orientation, brand orientation, and their emphasis and balance as well as the two strategic orientations' relation to the building blocks of media success are discussed in detail.

3.4 Discussion

Market orientation in the media has been defined as generating, disseminating, and coordinately responding to market intelligence on audiences, advertisers, and competitors. Throughout the transcripts of the 39 interviews, such a comprehensive approach could not be identified. The focus remained on the audience side, where market intelligence was generated. However, there was a deficiency in the dissemination of and responsiveness to the information. This was in line with findings by Usher (2013, p. 13) who detected a lack of “how and why journalists should use the powerful metrics available to them, and as such the quantified audience took on little meaning.” Competitors were considered to a lesser extent. The generation of market intelligence seemed to be mostly informal, while disseminating the information and responding to it was rare. According to the interviewees, the advertising market was the least investigated and taken into account. These findings correspond with those of Sommer (2016).

Brand orientation considers the brand as central to the entire organization and a hub around which the processes revolve. Within this strategic orientation, brand management becomes a core competence that encompasses defining a brand identity and developing strategies for the audience as well as the advertising market. Likewise to market orientation, throughout the transcripts of the 39 interviews, a comprehensive approach could not be identified. The interviewees emphasized elements of a brand identity. They pointed out the media brand’s importance on the audience side, while the image amongst advertisers was not an issue, as argued in Sommer (2015) and Sommer and Marty (2015). Consequently, there seemed to be a deficit in the implementation of brand orientation. This mirrored the findings by Baumgarth (2007; 2009b), who detected shortcomings in brand orientation behavior in the media.

Overall, the media brands investigated in the present study showed elements of market orientation and brand orientation. Yet, they lacked a comprehensive approach and has plenty of room to improve their capabilities and competencies in this regard. Deficits were also detected in the organization-wide communication, coordination, and implementation related to the two strategic orientations. Market orientation was somewhat more explicit, while brand orientation was addressed more implicitly. Similarly, Gerth (2010) proposed the concept of hidden brand identity, which means brand identity not being defined and managed, but nevertheless present in media professionals work. In brief, both strategic orientations offer room for greater professionalization.

Depending on the media brand, market orientation and brand orientation were differently emphasized and differently **balanced**. Similarly to Sommer et al. (2016), these differences did not show along the dimensions of seriality and content. However, the two strategic orientations should be more important for continuous media brands, since they are expected to enable long-term profit (Narver & Slater, 1990) and maintain sustainable competitive advantage (Urde, 1994, 1999). Business model, positioning, and maturity of the media brands seemed to be more influential. Naturally, the types of revenue streams impacted how audiences and/or advertisers were taken into account. For instance, business models focusing on revenues from readers, listeners, viewers and users (e.g., *Tagebuch der Arabischen Revolution*) posed different challenges to market orientation and brand orientation than one solely relying on advertising revenue (e.g., *Watson*). To be successful, media brands have to encompass the strategic orientations' corresponding tools (Baumgarth et al., 2011). Market orientation and brand orientation are also to some extent determined by the positioning of the media brand. A focus on entertaining audiences is related to market orientation, while the emphasis of high quality comes with brand orientation. In this regard, differences do not necessarily depend on the type of content. Some of the media brands attempted to entertain their audiences with information (e.g., *Clixoom*) and set their own standards in fictional storytelling (e.g., *Bestatter*). Correspondingly, differences regarding market orientation of dailies and weeklies were identified in Sommer and Krebs (2016) and differences in importance of the media brand in the advertising market were found in Sommer and Marty (2015). To be successful, the balance of the two strategic orientations needs to be aligned with the media brand's positioning (Urde et al., 2013). Regarding the maturity of the media brand, the results suggest shifting from market orientation to brand orientation over time. *Watson*, launched in 2014, managed to successfully grow its audience since its inception. In doing so, it showed a strong user focus and cooperation with advertisers and competitors, which is in line with the findings of Sommer (2016). To achieve sustainable success, a media brand needs to gradually shift towards brand orientation, which was illustrated by *Clixoom* thinking about brands in the long run. *Wien Tag & Nacht*, on the other hand, focused on its brand from the beginning, while insufficiently taking the competition into account and failing to take a large enough share of the market for the program to be continued. A stronger market orientation may have helped to establish the media brand. *2012's* approach was even more brand-centric and also lacked in success on the audience market. However, the interviewees referred to the media brand as an art project. They did not follow economic goals but focused on quality and reputation with which they were more than satisfied. Consequently, *2012* was internally perceived as a success, despite only reaching a small audience. This shows how the appropriate balance of market orientation and brand orientation also depends on a media brand's goals and the measures of success

(Baumgarth, 2009a). The example of *Tag & Nacht* illustrated that neither strategic orientation being emphasized leads to failure and leaves everyone dissatisfied.

Despite the media brands not showing a comprehensive approach of market orientation and brand orientation, the two strategic orientations are still related to the **building blocks of media success**. Both influence content, marketing, and external evaluation. Environmental orientation and distribution are dominated by market orientation, while brand orientation and brand identity influence design, internal processes, organizational aspects, leadership, and human resources. Since media brands gradually shift from market orientation to brand orientation, it can be assumed that the building blocks of media success are influenced by both strategic orientations and the building blocks of media success dominated by market orientation are more important for the launch and the early stages of products and services. The building blocks of media success related to brand orientation would accordingly increase in importance over time. In the course of this, the positioning and the business model of the media brand must be taken into account (Sommer & Krebs, 2016; Sommer & Marty, 2015).

Overall, media brands do not comprehensively implement market orientation and brand orientation. Consequently, the potential of the two strategic orientations is not fully exploited. While market orientation is emphasized more explicitly, brand orientation is related to more building blocks of media success. Professionalization regarding the two strategic orientations would implicate clearer guidelines and imply designing building blocks of media success in a way to be more successful (Sommer et al., 2016). The findings of the present study suggest that market orientation and brand orientation are complementary rather than mutually exclusive. Since the two strategic orientations share many underlying concepts, they have to be balanced with one another and they need to act in concert (O'Cass & Viet Ngo, 2007; Reid et al., 2005). In doing so, market orientation and brand orientation build on one another (Noble et al., 2002). Accordingly, media brands need to have both tools in their repertoire to be successful. How market orientation and brand orientation should be balanced depends on the maturity and the positioning of the media brand, which changes over time (Urde et al., 2013). The results suggest a gradual development from a more market-oriented approach to more brand-oriented one to achieve sustainable success. Wrongly overemphasizing one over the other or lacking a strategic orientation could result in failure. This is in line with brand orientation being described as “an additional degree of sophistication. It becomes a little bit more difficult because one has to both be market-oriented and brand-oriented. An organization can never only be brand-oriented” (Olle Tegstam, cited in Urde, 1999, p. 118). However, brand orientation seems to be more important in the media than in other industries. It allows following a wider range of goals and not solely focusing on economic values. Reputation and

cultural success are other measures that media brands are potentially interested in (e.g., 2012, *Bestatter*), which is similar to cultural institutions (Baumgarth, 2009a) and public organizations (Gromark & Melin, 2013). In addition, brand orientation helps organizations to create trust (Ewing & Napoli, 2005; Gromark & Melin, 2013). In the media, trust is important for all types of content ranging from information to entertainment. Fact and fiction both have to be reliable. This applies to the story on a news website as well as the plotline of a movie. The former and the latter convey culture and have an impact on society. Furthermore, brand orientation can facilitate integrating market intelligence in a two-sided market. The need to serve audiences and advertisers comes with challenges such as potentially contradicting signals from the two groups of customers (Sommer, 2016). In this context, brand identity can function as a point of reference and reduce complexity for the development of a successful strategy as contradicting signals potentially hinder success (Urde, 1994), while consistency fosters it (Hankinson, 2002; Sommer, 2015).

3.5 Limitations and further research

When interpreting the presented findings, several limitations have to be taken into account, which are similar to the arguments discussed in Sommer et al. (2016). They imply a need for further research.

The interviewees generally considered all success factors to be important, but the emphasis, the specificity, and the scope of the statements allowed to derive conclusions about their relative relevance. Strictly speaking, the analysis of the in-depth interviews only allows to assess success factors as they are perceived and portrayed by the interviewees. From this study design, it remains open whether this is a valid assessment of the actual success factors or simply the result of the desirable self-portrayal of media professionals, for example, as being audience-oriented rather than advertiser-focused. Since the “true” drivers of success are not accessible, the accounts of the involved individuals serve as suitable proxies as noted earlier. The media professionals regarding their project as something special was compensated through referencing different media brands. However, it must be taken into account that Austria, Germany, and Switzerland have strong public service broadcasters, which by definition, have to follow not only economic goals, but also generate value for society. This organizational background might impact the building blocks of media success, market orientation, and brand orientation, but was not systematically investigated in the present study. Therefore, the media system in German-speaking countries must be kept in mind when transferring the results to other contexts.

When interpreting the results, it is also important to note that market orientation and brand orientation were not the subject of focus in the interviews. It was assumed that they can still be detected in the interviewees' descriptions if present, since strategic orientations are guiding principles for the entire organization. In doing so, it is possible to obtain a more accurate understanding of the pervasiveness and the importance of market orientation and brand orientation since the interviewees' responses were not steered in a certain direction.

Another limitation is that the media brands were investigated based on one-time interviews and not interviews over a longer period of time. Conclusions regarding the development of the strategic orientations and the building blocks of media success had to be drawn based on additional desk research and through comparing new media brands with mature ones.

As the findings are based on qualitative interviews with 39 media professionals, they are not representative. In future studies, it would be interesting to develop scales and measures to quantify and compare market orientation and brand orientation as well as the building blocks of media success. In addition, this approach would allow to quantitatively investigate the influence of the two strategic orientations on success as well as on success factors. For this purpose, a standardized survey is needed. It would also be worth examining the changes in the building blocks of media success, market orientation, and brand orientation over time in more detail, which could be linked to change management (Urde et al., 2013). Future research could also focus on the positioning and business models of media brands in relation to their strategic orientation and the building blocks of media success. Last but not least, the findings in the media industry have to be put into context. To do so, the relation of market orientation and brand orientation with success and success factors in other two-sided markets needs to be investigated.

3.6 Conclusion

In the following, conclusions regarding market orientation, brand orientation, and their emphasis and balance (RQ 4) as well as the two strategic orientations' relation to the building blocks of media success are drawn (RQ 5).

Based on a comprehensive literature review, it is argued that market orientation and brand orientation need to be negotiated in relation to audiences, advertisers, and competitors. Market intelligence should be generated and disseminated throughout the media outlet, and evaluated based on and coordinated

with the brand identity, which results in the media brand's strategy. Emphasizing and balancing market orientation and brand orientation appropriately has a positive influence on success.

However, the findings of the present study show that the investigated media brands do not follow such a comprehensive approach regarding market orientation and brand orientation. Their focus lies on the audience side, where market intelligence is generated, but insufficiently disseminated and responded to. Competitors are considered to a lesser extent. The generation of market intelligence seems to be mostly informal, while disseminating of and responding to the information is rare. According to the interviewees, the advertising market was the least investigated and considered. Brand orientation and brand identity were described more implicitly. The interviewees emphasized the internal importance, while focusing on the audience side externally, the image amongst advertisers was not an issue. Overall, the two strategic orientations rarely seemed to be the mindset and the organizational culture of the media brands. Deficits were also detected in organization-wide communication, coordination, and implementation related to market orientation and brand orientation. Accordingly, there is room to improve the capabilities and competencies in this regard.

When looking at the emphasis, specificity, and scope of the interviewees' descriptions regarding the elements of market orientation and brand orientation, different levels of the two strategic orientations were detected. They were either equally important or one was favored over the other. These differences did not show along the dimensions of seriality and content. However, the literature suggests that market orientation and brand orientation should be more important for continuous media brands since they are expected to enable long-term profit and sustainable competitive advantage. Maturity and the positioning of the media brand seem to influence the balance. Over time, it is suggested that media brands should shift from emphasizing market orientation towards brand orientation for sustainable success. Providing high quality is related to an emphasis on brand orientation in order to be successful. However, the two strategic orientations are complementary and media brands need to have both tools in their repertoire.

Conclusion RQ 4:

- Market orientation in the media focuses on audiences, while competitors and advertisers are considered less thoroughly.
- Brand orientation in the media is addressed implicitly, with an emphasis on its internal importance while focusing on audiences externally.

- Different levels of market orientation and brand orientation can be detected across the investigated media brands. The two strategic orientations are either equally important or one is favored over the other. The appropriate balance is important for a media brand's success.
- Over time, shifting from market orientation towards brand orientation is expected to foster success. Media brands focusing on high quality emphasize brand orientation to be successful.
- Market orientation and brand orientation are complementary and media brands need to have both tools in their repertoire.

Regarding the building blocks of media success, content seemed to be most important. Human resources, design, and marketing were also considered to be influential. The same holds true for distribution, but to a lesser extent. Organizational aspects, internal processes, and environmental orientation appear not as valuable. The interviewees assessed external orientation and leadership to be least important. Despite the media brands not showing a comprehensive approach of market orientation and brand orientation, the two strategic orientations were still related to the building blocks of media success. Both influence content, marketing, and external evaluation. Environmental orientation and distribution were dominated by market orientation, while brand orientation and brand identity influenced design, internal processes, organizational aspects, leadership, and human resources. It is argued that brand orientation is more important in the media compared to other industries because of media outlets not solely focusing on economic values, but following a wider range of goals. They also need to create trust and face challenges of a two-sided market. In this context, brand identity can function as a point of reference and reduce complexity in order to be successful.

Conclusion RQ 5:

- Market orientation and brand orientation are related to content, marketing, and external evaluation.
- Market orientation influences environmental orientation and distribution.
- Brand orientation influences design, internal processes, organizational aspects, leadership, and human resources.
- Overall, market orientation is emphasized more explicitly and brand orientation is related to more building blocks of media success.
- Brand orientation is more important in the media compared to other industries since it enables following multiple goals, creating trust and integrating market intelligence in a two-sided market.

The present study is the first investigation of market orientation and brand orientation in a two-sided market. Their relation to success factors supports the pervasiveness of strategic orientations (Gromark & Melin, 2011; Noble et al., 2002; Reid et al., 2005). The findings add to the literature, which defines market orientation and brand orientation as complementary rather than mutually exclusive (Ahmad & Iqbal, 2013; Mulyanegara, 2011; O'Cass & Viet Ngo, 2007; Reid et al., 2005; Reijonen et al., 2012). Moreover, it suggests that these hybrid forms change over time (Urde et al., 2013). Accordingly, the two strategic orientations should also be jointly investigated in the future. Furthermore, the results are in line with brand orientation being particularly important when following multiple goals and when attempting to create trust (Baumgarth, 2009a; Ewing & Napoli, 2005; Gromark & Melin, 2013). The study extends existing literature in emphasizing the importance of brand orientation in a two- or multi-sided market, especially since it can reduce complexity and enable the integration of potentially contradictory information from two or more markets.

In media practice, capabilities and competencies regarding market orientation and brand orientation should be developed further. Professionalization would enable balancing the two strategic orientations appropriately to exploit the potential and positively influence success. In doing so, market orientation and brand orientation could be a point of reference when designing building blocks of success to develop and improve products and services in times of digitalization and convergence, since they are independent from different means of distribution and types of media.

4 Résumé

The following section summarizes the theoretical and managerial implications of the doctoral project (4.1) as well as the general limitations and further research (4.2) before drawing a final conclusion (4.3).

4.1 Theoretical and managerial implications

The application of market orientation and brand orientation for media outlets highlights the importance of taking the characteristics of media products and services into account when applying any theory to the field of media. The empirical findings confirm that relationships are less systematic compared to the results in other industries. While market orientation is related to the success of dailies, the opposite holds true for weeklies. The media brand, on the other hand, is of different importance to media planners, depending on their client. Regarding the balance of market orientation and brand orientation, different paths can foster success, depending on the business model, positioning, and maturity of media brands. Accordingly, media management research needs to be context sensitive and explicate the context. In doing so, it must be considered that media outlets serve audiences and advertisers. The findings indicate that the former are prioritized over the latter. However, mutual influences have to be taken into account in any media management study since they may impact the constructs under investigation as well as the results.

Regarding the relationship of market orientation and brand orientation from a theoretical perspective, the findings of their first application in a two-sided market support the notion of the two strategic orientations being complementary rather than mutually exclusive. Consequently, they should be examined together rather than individually. When studying market orientation in the future, brand orientation must be taken into account and vice versa. In addition, it is argued that, in two-sided markets, brand orientation is more important compared to other industries. The findings also suggest a relation of market orientation and brand orientation to success, which is either direct or indirect via strategic orientations' influence on success factors.

Success factors have previously been investigated for single types of media. In generalizing the results and identifying the building blocks of media success independent from any means of distribution, the presented research lays the foundation for future studies of success factors in the media and supports the transferability of the findings on an abstract level. This is particularly important to update theory for times of digitalization and convergence. To do so, a categorization to distinguish media brands, based on the dimensions of seriality and content, is suggested. However, since the results are

inconclusive, further efforts to develop a new systematization independent from types of media are necessary. The best solution might be different for every study. By all means, more comprehensive approaches should be applied: The focus must center on media outlets or media brands, respectively, rather than on means of distribution. Consequently, media management research should increasingly merge the findings from different contexts on an abstract level and focus on capabilities and competencies.

For media managers, the presented research suggests to invest in and to professionalize market orientation and brand orientation to exploit the strategic orientations' potential. In doing so, different groups of customers need to be taken into account and markets have to be prioritized. The balance of market orientation and brand orientation also deserves special attention. It must be thoroughly considered which strategic orientation to emphasize depending on the media brand. Different business models, positioning, and maturity seem to have different needs. The findings suggest focusing on market orientation when launching a new product or service. Flexibility regarding the competition as well as serving the audiences' and advertisers' wants and needs arguably foster success. Over time, shifting towards brand orientation is recommended. Media managers should be aware of it as a strategic resource and place more effort into brand management internally as well as in its relationship with audiences and advertisers externally. In making the brand central to the media outlet and its processes, its allowance for following multiple goals, its ability to create trust, and its function as a point of reference for potentially conflicting market intelligence on audiences and advertisers can be exploited. As market orientation and brand orientation are complementary and build on one another, media managers need to have both tools in their repertoire and use them, depending on the challenge that they are facing.

Market orientation and brand orientation can also serve as a starting point for designing the building blocks of media success. While not providing a guide to outstanding performance, the building blocks of media success represent industry standards based on which media brands can be analyzed and compared to other players in the market. In doing so, a broader understanding of competition is suggested. In times of digitalization and convergence, seriality and content are two possible dimensions for market demarcation rather than types of media and means of distribution. Subsequently, media managers must define which success factors to focus on and how to develop them in a unique way. This is the foundation of developing and improving a media outlet to be successful over the long term.

4.2 General limitations and further research

Success factor research has been criticized for its key informant bias, endogeneity, simultaneity, unobserved heterogeneity, regression-to-mean problem, and survival bias (Hurrell & Kieser, 2005; March & Sutton, 1997; Nicolai & Kieser, 2002). Other scholars, however, defend the stream of research (Bauer & Sauer, 2004; Fritz, 2004; Homburg & Krohmer, 2004). In designing the presented studies, these methodological discussions were considered as much as possible. Whenever accessible, information from different sources was collected, such as multiple interviewees and additional desk research, to avoid key informant bias. To compensate for endogeneity, a comprehensive literature review was conducted and the results were embedded in the findings of other studies. The variance of the media brands investigated addressed simultaneity and unobserved heterogeneity. The exploratory nature of the presented research and the focus on understanding basic foundations and processes cushion the regression-to-mean problem. Survival bias was taken into account through interviewing media professionals regarding media brands that had been discontinued.

Relying on interviews and surveys as primary sources of data does, however, lead to problems such as low response rates, self-selection and limited control. In addition, phenomena such as ex-post rationalization, can occur. As mentioned earlier and in Sommer et al. (2016), media professionals tend to consider all aspects related to media success as important when asked in an interview and they perceive their project as special. Despite the methodological issues, interviews and surveys are still the best options when investigating success factors across different types of media since they allow focusing on media brands and bridging different means of distribution. Future research should apply different methods such as content analysis or participant observation.

Furthermore, it must be taken into account that the presented research in parts is an isolated analysis of market orientation and brand orientation. Such partial studies can only explain a particular share of a phenomenon and potentially overestimate or underestimate an effect because of the negligence of other influences. Consequently, future studies should encompass different strategic orientations and multiple success factors.

Scales and constructs were derived from the literature; however, they had to be adapted or developed for the presented studies. It is uncertain to what extent the chosen items actually cover the respective constructs. The exploratory nature and small sample sizes limit the generalizability of the findings. Future research should repeatedly investigate the phenomena under study to improve reliability and validity of the findings. In doing so, efforts must be made towards developing scales and measures for

market orientation and brand orientation in the media as well as for the building blocks of media success. For instance, regarding the media brand, its influence internally as well as externally in the relationship to audiences and advertisers poses challenges for operationalization. A quantification of effects based on a larger number of cases would allow for a clearer picture of the relative importance of the strategic orientations and the building blocks of media success.

When interpreting the findings of the presented studies, the contexts in which the research has been conducted need to be taken into account, which included Austria, Germany, and Switzerland for the larger part. German-speaking countries have strong public service broadcasters, which by definition, have to follow not only economic goals, but also generate value for society. The organizational background of a public service broadcaster arguably influences the importance of market orientation and brand orientation as well as the building blocks of media success. However, this was not systematically investigated. This characteristic of the media system might also have an impact on other media outlets. However, it is suggested that strategic orientations are universally applicable and different contexts should not impact basic principles. In the same vein, it can be assumed that the building blocks of media success are valid across different markets, since the comprehensive literature review they are based on merged the findings from different contexts. Nevertheless, future studies should investigate the transferability of the findings and check for differences between media markets and media systems.

To further develop the field of strategic orientations and success factors in the media, future research should also study the differences between media brands, depending on size, business model, positioning, and maturity. Different levels of analysis, such as product brand versus corporate brand, would also be of interest. In going forward, Qualitative Comparative Analysis (QCA) can be applied. Based on Boolean algebra, the context-sensitive method would enable identifying the necessary and sufficient conditions of media success. In comparison to regressions analysis, different paths to the same outcome are possible and the strategic orientations and the building blocks of success can enact with one another rather than competing with one another (Ragin, 1987, 2000, 2008). Further advantages include standardization and easy replication of studies with small, medium, and large sample sizes, while case knowledge is taken into account. In other industries, QCA has already been successfully applied when studying factors influencing an organization's performance (Ordanini & Maglio, 2009; Vis, Woldendorp, & Keman, 2007; Winand, Rihoux, Qualizza, & Zintz, 2011).

In addition, research bridging means of distribution should be strengthened. Studies following a more comprehensive approach can meet developments in media practice. Consequently, capability- and

competence-based systematizations of the competition need to be developed, such as the suggested dimensions of seriality and content, to facilitate designing projects and sampling processes. A further challenge would be to measure success across different types of media and incorporate multiple measures of performance. In doing so, QCA would be helpful because of its context sensitivity and the option to integrate multiple measures of success (Vis, Woldendorp, & Keman, 2013).

Overall, the perspective of media management research should be integrated into a larger number of studies conducted in the media. Conversely, it would be valuable to tie media management research more closely to other disciplines and place the findings into context. The literature on two-sided markets is an example of a field which could benefit from such actions.

4.3 Final conclusion

This first comprehensive application of market orientation and brand orientation in the media related the two strategic orientations to competencies, capabilities, and resources of media outlets. Regarding market orientation (RQ 1), audiences and advertisers need to be considered alongside competitors. In doing so, markets were prioritized. While the influence of market orientation on success has been shown in multiple industries, relationships in the media have been consistent. Regarding brand orientation (RQ 2), it was also suggested to take audiences and advertisers into account. Again, the differences between media outlets regarding the importance of the media brand were detected.

In addition, the findings of success factor research were generalized and brought to a level of abstraction, which makes them independent from types of media and means of distribution for the first time (RQ 3). Building on a comprehensive literature review and an empirical study, ten building blocks of media success were identified: content, design, environmental orientation, internal processes, organizational aspects, leadership, human resources, marketing, distribution, and external evaluation. To meet developments in media practice in times of digitalization and convergence, it was suggested to distinguish media brands based on seriality and content since they are independent from types of media and they can be related to capabilities and competencies.

When investigating the balance of market orientation and brand orientation (RQ 4), the two strategic orientations are of different importance for media outlets, depending on the business models, positioning and maturity. They need to be emphasized and balanced appropriately for a media brand to be successful. Media brands should shift from market orientation towards brand orientation over time and emphasize brand orientation if focusing on high quality.

Market orientation and brand orientation are related to the building blocks of media success (RQ 5). Both strategic orientations influence content, marketing, and external evaluation. Environmental orientation and distribution are dominated by market orientation. Brand orientation influences design, internal processes, organizational aspects, leadership, and human resources. Overall, brand orientation is more important in the media compared to other industries since it enables following multiple goals, creating trust and integrating market intelligence in a two-sided market.

Overall, the doctoral project provides answers to the question raised earlier: *“What makes media outlets successful, independent from types of media and means of distribution?”* Market orientation and brand orientation influence success directly as well as via the building blocks of media success, which were identified in the literature and empirically evaluated. Based on these findings, media managers can further develop existing products and bring new services to market. In doing so, they are well equipped to face the challenges related to audiences, advertisers, and competitors, especially in times of digitalization and convergence.

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Publications

Sommer & Krebs (2016): Market Orientation in News Media

How learning about and responding to readers and competitors impact success. *Journal of Applied Journalism and Media Studies* (under review).

Abstract

Because of technological developments, it has become easier for media outlets and its actors to collect data, which facilitates the gaining of knowledge regarding customers and competitors. We apply market orientation theory and investigate through standardized interviews with high-level media representatives whether market-oriented news outlets are more successful in terms of circulation change. The results of this exploratory study show that dailies, which emphasize reader orientation and a swift reaction to competitors' initiatives, are rewarded with success. For weeklies, the opposite is true. Rating means of researching the readership and responsiveness to the competition low is associated with an increase in circulation. These findings call for different media management strategies depending on the type of news outlet.

1 Introduction

In times of digital transformation and high uncertainty, media outlets are forced to (further) develop their products and services. Although there is a lack of research & development in the media (Adams, 2008; Nordqvist, Picard, & Pesämaa, 2010; Picard, 2002b), the importance of innovation has been emphasized in the literature (Kaye & Quinn, 2010; van Weezel, 2010). In media practice, it is pointed out that the audience has to be involved in these processes for media to succeed in the market (Lobe, 2004; Reich, 2009). Media studies literature describes the audience focus as crucial (Ruß-Mohl, 2004). However, very little is known about its relationship with success amongst readers. Reaching an audience is vital, especially since news outlets need readers to make a profit (or at least to survive) and fulfill their functions for society. Because of digitalization and social media, it has become easier to collect data about the audience as well as involve it in development processes, which makes the question even more relevant.

By applying market orientation theory to the media, we address this academic void. The relationship of market orientation to success has been investigated in numerous studies and industries. While the definitions of success differ, the results tend to show a positive effect of market orientation (Luca et al., 2010). Regarding news media, the research focuses on journalists and the audience (Beam, 2001; Tandoc & Ferrucci, 2014), while neglecting advertisers and competitors. As new technologies affect the business of news (Greenwood, 2013), there is a need for re-assessing the situation in the news industry and examining market orientation more comprehensively by asking the following research question: *Are market-oriented news outlets more successful?*

Accordingly, this study provides a comprehensive literature review of market orientation theory and develops a market orientation model for media outlets (Section 2). The focus lies on a media management perspective and not market orientation from a normative point of view. Sections 3 and 4 summarize the research questions and the methodological approach. Subsequently, the results are presented and discussed in Sections 5 and 6. In the final sections of this study (Sections 7 and 8), we present the limitations, provide recommendations for further research, and draw conclusions for media management theory and practice.

2 Literature review

2.1 Market orientation

Market orientation “is the organizationwide *generation* of market intelligence pertaining to current and future customer needs, *dissemination* of the intelligence across departments, and organizationwide *responsiveness* to it” (Kohli & Jaworski, 1990, p. 6). Following Narver and Slater (1990), market orientation consists of three behavioral components—customer orientation, competitor orientation, and interfunctional coordination—which are considered important for long-term profit. Previous studies assumed that market orientation is a key factor, especially in times of uncertainty (Jaworski & Kohli, 1993; Li & Calantone, 1998; Wren et al., 2000).

Market orientation theory stems from the dynamic capabilities approach (Day, 1994). Dynamic capabilities are “the firm’s ability to integrate, build, and reconfigure internal and external competences to address rapidly changing environments” (Teece et al., 1997, p. 516). As such, they should be unique, honed to users’ needs, and difficult to replicate. Accordingly, these capabilities can be seen as success factors of companies, since “the approach endeavors to explain firm-level success and failure” (Teece et al., 1997, p. 509). Examples include sensing opportunities, seizing structures and processes, and managing threats (Teece, 2007). Regarding market orientation, there are specific capabilities, such as collecting knowledge of the needs and processes on the customers’ side (Danneels, 2002, p. 1103; Day, 1994) and learning about the competition, which involves evaluating strengths and weaknesses as well as emerging markets and rivals (Narver & Slater, 1990; Slater & Narver, 1995). It has also been described as understanding a market or an industry in a business sense as well as in a technical sense (Wong & Tong, 2012).

There are various ways to obtain knowledge about customers and competitors. Traditional market research methods—which are most common—include focus groups, surveys, customer visits, sales force feedback, voice of the customer programs, and concept testing (Slater, Olson, & Sørensen, 2012). To go beyond these practices and address customers’ latent needs, their use of products must be observed. Companies also work closely with lead users and conduct market experiments (Slater et al., 2012). For such purposes, toolkits are developed (Hippel, 2006).

Whether market orientation is an important capability of companies has been investigated numerous times in various industries (e.g., Atuahene-Gima, 1996; Bodlaj et al., 2012; Langerak et al., 2004; Lindbolm et al., 2008; Luca et al., 2010; Narver & Slater, 1990; Wong & Tong, 2012; Wren et al., 2000). The results generally show a positive effect or at least an indirect influence on success, while its

definition varies. Narver, Slater, and MacLachlan (2004), for instance, include the item “New-product success compared to our major competitor is good” in their survey questionnaire. Most frequently, questions about profit, sales, or achievement of goals are used, which has been criticized in the literature as it may lead to a key informant bias (Hurrle & Kieser, 2005). Other studies collect data on measures of success through independent sources, such as annual reports, to avoid this methodological problem.

2.2 Market orientation of media outlets

When applying market orientation theory to the media, one must consider that media outlets have to serve two groups of customers: audiences and advertisers (Wildman, 2006). This two-sided markets concept points out this business model (Anderson & Gabszewicz, 2006; Rochet & Tirole, 2006). One or several platforms enable interactions between end-users. Changes in a first market always affect the second one, and vice versa. Correspondingly, advertisers benefit from a growing audience, and the audience benefits from a high number of advertisements, for instance, when they offer information (Dewenter, 2006). Studies also show that the interests of media outlets’ groups of customers are not mutually exclusive, as the audience does not necessarily dislike advertising (Grusell, 2007; Kaiser & Song, 2009). Kaiser and Wright (2006, p. 23) explain the markets’ relationship: “Reflecting the fact advertisers value readers more than readers value advertisements, we find that an increase in reader demand results in an increase in ad rates while an increase in advertising demand results in a decrease in cover prices.” Regarding the markets’ relationship to competitors, Kind et al. (2009) show that the scope for raising revenues from audiences is constrained by other media outlets that offer close substitutes; whereas the scope for raising revenues from advertisers is constrained by how many competitors the media outlet faces.

Figure 1 merges the literature on market orientation, two-sided markets, and the media. A market-oriented media outlet generates, disseminates, and coordinately responds to market intelligence on audiences, advertisers and competitors to be successful. The audience and advertising markets are connected as advertisers pay for access to audiences and audiences benefit from advertisers’ information and contribution to the media outlet’s revenue. Depending on the business model and their importance for revenues, one group of customers is potentially favored over the other. The audience market is also connected to the competition as audiences can find substitutes elsewhere and other players can aim for the same target groups. The same holds true for advertisers and competitors.

While the former may find substitutes elsewhere, the latter compete for a share of the advertising market. Overall, market orientation should positively influence a media outlet's success.

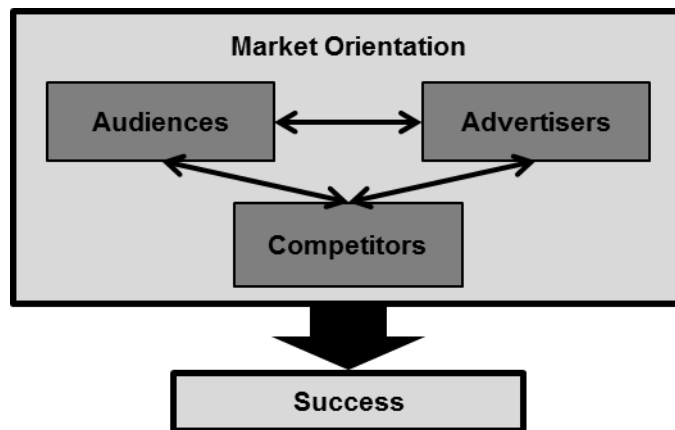


Figure 1: Market orientation of media outlets

Research shows that integrating readers and viewers in the development process of new media products fosters success in terms of the achievement of goals (Habann, 2010). However, studies on market capabilities and market research on the audience are scarce in the media (Valanto, Kosonen, & Ellonen, 2012; Weaver, 1981). It has been shown that news outlets conduct surveys and focus groups quite frequently (Beam, 1995; Maier & Jers, 2008). Recently, commenting on articles and social media has become a popular means of gaining reader insights, and analyzing online metrics allows news outlets to observe the audience's use of products and services (Anderson, 2011, 2013; Christin, 2014; Dick, 2011; Graves & Kelly, 2010; Lee, Lewis, & Powers, 2014; Tandoc, 2014b; Usher, 2013). Moreover, the literature shows that informal ways to collect information, such as private contacts, colleagues' reports, and responses from readers, are more common than the use of readership or academic research (Keel, 2011; Marr, Wyss, Blum, & Bonfadelli, 2001; Weischenberg, Malik, & Scholl, 2006).

There are several examples regarding the investigation of the audience. *Die Zeit*, a German weekly newspaper with a popular website, uses its research tool *Leserbarometer* to determine readers' opinions on different versions of the cover page as well as their views on the latest issue. The *New York Times* recently redesigned its website, including a new analytics program which will give the news outlet "a wealth of information about its readers" (Abbruzzese, 2014). Usher (2013) describes how web metrics are used at *Al Jazeera*. The Swedish news outlet, *Aftonbladet*, involves readers in every step of the media

production process (Ots & Karlsson, 2012). Serving the community and creating community engagement are seen as a successful strategy in the current crisis (Mwangi, 2011).

Beam has contributed much to market orientation in the media. His studies investigate its relationship to environmental uncertainty (Beam, 1996), journalistic values (Beam, 1998), success in terms of higher circulation and household penetration (Beam, 2001), and content differences (Beam, 2003). Throughout his research, he points out the differences between news outlets with a weak market orientation and those with a strong market orientation. For instance, senior editors from market-oriented newsrooms feel less uncertainty about their environment and more confident in adapting to changes in their environment (Beam, 2001). Tandoc and Ferrucci (2014), in their study on web analytics, find the adoption of such practices being further developed in market-oriented newsrooms. However, the focus lies on journalists and the readership, whereas the advertising side and the competition are not included.

Habann (2010) points out that the acceptance of a media innovation by advertisers is important for its success. In their investigation on media outlets' drivers of advertisement sales, Wirtz, Pelz, and Ullrich (2011) shows that publishers with above-average marketing competencies, such as market observation, identification of market opportunities, and utilization of market opportunities, generate higher advertising revenue than their competitors.

The literature also offers a few examples of how media outlets are working with advertisers. For example, *Seven One Media*, a marketer for audio-visual media, uses an internal tool to develop new concepts for advertisements (Mangold & Kunz, 2004; Reichwald, Meyer, Engelmann, & Walcher, 2007). At *Tamedia*, a Swiss publisher, a customer relationship management system is used across products and services to obtain better information about their advertisers (Crowden, 2010).

Media outlets have to offer an advantage to their customers compared to the competition to be successful (Bleis, 1996). Monitoring competitors' activities has been identified as having a positive effect on the achievement of media outlets' goals (Habann, 2010). Numerous studies have focused on competitors' influence on content and advertising (e.g. Becker, Hollifield, Jacobsson, Jacobsson, & Vlad, 2009; Coulson & Lacy, 1996; Lacy, 1987; Shaver & Lacy, 1999). Research also shows that media outlets respond to competition, for instance, through release strategies, product differentiation, and increasing expenditures (Kridler & Weinberg, 1998; Lacy & Martin, 2004; Lee & Han, 2006; Shrikhande, 2001).

While there are some studies that investigate certain components of the suggested market orientation model, a comprehensive analysis does not exist. Hence, we will examine market orientation and success in the media in more detail.

3 Research questions and hypotheses

Following the literature review, market orientation is a success factor in several industries. Studies in the field of media show that audience and advertising markets are connected (Godes, Ofek, & Sarvary, 2009), with the audience being valued more by advertisers than vice versa (Kaiser & Wright, 2006). In addition, it is argued that advertisers are better served when a media outlet knows its audience well (Perez-Latre, 2007). Ultimately, without an audience, the news outlet cannot serve advertisers at all. Therefore, the present study focuses on audiences and competitors when investigating the market orientation of news outlets.

Our first research question focuses on overall market orientation and news outlets' success:

RQ 1: Are overall market-oriented news outlets more successful?

Second, we explore reader orientation and success by asking the following research question:

RQ 2: Are reader-oriented news outlets more successful?

In our third research question, we investigate competitor orientation and success:

RQ 3: Are competitor-oriented news outlets more successful?

As several studies in other industries show a positive relationship between market orientation and success (e.g., Luca et al., 2010), and Beam (2001) finds a positive influence on senior editors' perception of uncertainty about their newsroom's environment and their confidence in being able to adapt to changes in its environment, we assume that overall market-oriented, reader-oriented and competitor-oriented news outlets are more successful.

4 Methods

4.1 Data

This study was conducted within a multidisciplinary research project across Denmark, France, Italy, Germany, Switzerland, and the United Kingdom. Against other cross-national studies (Livingstone,

2003; Picard & Russi, 2012), the focus does not lie on the nation, but on the market to enhance comparability. Thus, we rely on news outlets in the corresponding metropolitan areas Berlin, Copenhagen, London, Paris, Rome, and Zurich.

The sample was systematically selected within the predefined markets and, in the first step, it included leading news outlets in terms of circulation. We argue that market orientation is best suited in European markets when applied to the most important newspapers, especially since they need to differentiate from direct rivals.

As market orientation places the customer in the center of attention, we also accounted for the audience's perspective in the sampling process. Hence, in the second step, markets are defined based on an audience survey. The sample is representative in terms of participants' sex, age, and residence. A panel was separately designed at the metropolitan and national level in every country.² Through an online questionnaire, readers were asked which newspapers they read at least once a week based on a list of the sampled newspapers. Additionally, they were asked to mention "other news outlets" that they used. The sample of newspapers drawn on the highest circulation was matched with the respondents' frequency of usage, which led us to include additional news outlets. This process resulted in a total number of 74 news outlets, which we investigated based on our research questions.

In 2010, we conducted standardized telephone interviews with media representatives in their respective languages (except in Denmark, where the interviews were held in English). While on the telephone, the respondents were asked to complete an online questionnaire and rate the items based on a five-point Likert scale (ranging from 1 = not important to 5 = very important). This allowed us to strengthen the commitment of high-level representatives of news outlets, which led to a total response rate of 49% (n = 36): Denmark (n = 7); France (n = 6); Italy (n = 5); Germany (n = 4); Switzerland (n = 13); and the United Kingdom (n = 1; see Table 1). However, the total number of respondents was rather low, even though we reached out to media representatives several times via e-mail and phone. The greatest problem was not scheduling the interviews but the availability of the high-ranking media representatives. Nevertheless, we did not compromise our sample and we simply interviewed the editors-in-chief (or deputies) and CEOs (or deputies) with editorial involvement. The respondents

² Berlin (N = 741), Copenhagen (N = 749), London (N = 740), Paris (N = 741), Rome (N = 738), and Zurich (N = 748). Denmark (N = 1489), France (N = 1495), Italy (N = 1459), Germany (N = 1482), Switzerland (N = 1523), and the United Kingdom (N = 1494).

Table 1: Description and circulation of news outlets

News outlet	Type of News Outlet	Country	Circulation 2010	Change of Circulation 2010—2011 (in %)
20 Minuten	Free	Switzerland	494'368	0.37
20 minutes	Free	Switzerland	207'112	-1.82
20 minutes	Free	France	448'766	12.08
B.T.	Daily	Denmark	69'106	-2.74
B.Z.	Daily	Germany	183'791	-9.20
Blick	Daily	Switzerland	214'880	-3.13
Blick am Abend	Free	Switzerland	329'418	-2.59
Børsen	Daily	Denmark	73'153	-4.53
City	Free	Italy	1'861'666	-5.40
Ekstra Bladet	Daily	Denmark	73'557	-10.88
FAZ	Daily	Germany	383'932	-0.92
Il Messaggero	Daily	Italy	192'982	-1.00
Jyllands-Posten	Daily	Denmark	109'257	-5.04
L'Express	Weekly	France	534'919	-0.86
La Repubblica	Daily	Italy	449'238	-2.40
Landbote	Daily	Switzerland	33'101	-2.78
Le Figaro	Daily	France	330'237	1.25
Le Matin	Daily	Switzerland	57'894	-1.38
Le Matin Dimanche	Weekly	Switzerland	188'053	-6.88
Le Monde	Daily	France	319'022	1.93
Le Parisien	Daily	France	297'173	-2.35
Le Temps	Daily	Switzerland	44'450	-4.75
leggo	Free	Italy	1'993'000	-2.77
Métro	Free	France	424'322	11.90
metronews	Free	Italy	1'580'333	-1.39
MetroXpress	Free	Denmark	192'825	0.43
NZZ	Daily	Switzerland	136'894	-3.18
NZZ am Sonntag	Weekly	Switzerland	129'813	0.25
Politiken	Daily	Denmark	100'303	-1.98
Sonntagszeitung	Weekly	Switzerland	188'658	-3.58
Süddeutsche Zeitung	Daily	Germany	443'243	-1.94
Tages-Anzeiger	Daily	Switzerland	203'636	-4.10
The Daily Telegraph	Daily	UK	672'990	-8.21
Weekendavisen	Weekly	Denmark	53'114	2.02
Welt	Daily	Germany	264'677	1.03
Weltwoche	Weekly	Switzerland	79'753	-2.51

needed to have comparable roles and an overview of the news outlet as a whole to avoid biased information.

As shown in Table 1, our data set was complemented through secondary sources. We collected circulation data for 2010 and 2011, which was provided by the members of the International Federation of Audit Bureaux of Circulation (IFABC). For Italian free media, we used Audipress figures as the circulation data was unavailable.

4.2 Operationalization

First, we investigate overall market orientation. The respondents were asked whether their news outlet aims to meet readers' and stakeholders' interests to capture the broader strategy. This item was derived from prior studies (Beam, 2001; Ewing & Napoli, 2005; see Table 2).

Table 2: Market orientation

Item	Mean (SD)
Shrewdly judged action to uphold readers and stakeholder interests	3.91 (0.87)

n = 34; "Please indicate how important the following measures are for your news outlet as a means of achieving your goals"; Five-point Likert scale: 1 = not important to 5 = very important

Second, we focus on the audience side, as indicated above. In doing so, we investigate different means of research in this market. Journalism studies have covered this issue in the past, from which the items are derived (Keel, 2011; Marr et al., 2001; Weischenberg et al., 2006; see Table 3). The present study follows a more focused way compared to prior research that asked general questions such as whether a news outlet informs itself about its customers' wants and needs.

Table 3: Reader orientation

Item	Mean (SD)
Private contacts with individual readers	3.28 (1.02)
Colleagues' reports on your readers	3.18 (1.01)
Responses from your readers (e.g., readers' letters)	3.97 (1.02)
Readership/audience research and/or opinion polling	3.55 (1.09)
Academic communication research	2.88 (0.94)

n = 33; "How important are the following methods of researching your readership?"; Five-point Likert scale: 1 = not important to 5 = very important

It can be assumed that the various methods of research (see Table 2) complement one another. If a news outlet rates an item low or does not use a certain method at all, then the news outlet can altogether still be strongly market oriented (Russi, 2013). Therefore, since Cronbach's Alpha of 0.725 is acceptable, we calculated the average of the five items to form an index (see Table 4).

Table 4: Index reader orientation

Item	Mean (SD)	Cronbach's Alpha
Index reader orientation	3.33 (0.69)	0.725

n = 33; 1 = not important to 5 = very important

Third, in addition to the audience side, competitor orientation is investigated. Three items were derived from the literature (Ewing & Napoli, 2005; Narver & Slater, 1990; Wong & Tong, 2012; see Table 5).

Table 5: Competitor orientation

Item	Mean (SD)
Editorial strategy of differentiation from competitors	4.42 (0.69)
Analysis of competitors' strengths and weaknesses	3.31 (0.86)
Swift reaction to competitors' initiatives	3.56 (1.05)

n = 36; "Please indicate how important the following measures are for your newspaper as a means of achieving your goals"; Five-point Likert scale: 1 = not important to 5 = very important

As Cronbach's Alpha was below 0.50, we refrained from calculating an index. Moreover, the three possible combinations of two out of three items did not show any satisfactory results, which means that an editorial strategy of differentiation, analysis of strengths and weaknesses, and swift reactions to initiatives are three distinct dimensions of competitor orientation. This may be the case because of their difference in timeliness. Swift reactions are a short-term approach and analysis of strengths and weaknesses is an ongoing method, whereas an editorial strategy of differentiation is more long-term oriented and one of the foundations of a news outlet.

For the operationalization of success, we relied on circulation data as frequently seen in other studies (Schönbach, 2004). It is the key figure in the audience market, best comparable across countries because of similar methods and strongly correlations with online reach (Illenberger, 2013). More specifically, we calculated the change of circulation from 2010 to 2011 in per-cent as a measure of success. In doing so, news outlets are better comparable across markets. We also have more variance in our sample than other studies, which have been criticized for only examining successful media products and services (e.g., the top 100 movies over a certain period). Our approach also allows for the news outlet with the

highest circulation to be unsuccessful as it could have seen a sharp decline. Conversely, a small circulation can still be a success if it strongly increases. Furthermore, using circulation data enables us to deal with the criticism of success factor research regarding key informant bias, as independent and dependent variables are collected independently (Hurrell & Kieser, 2005).

Overall, news outlets' circulations are decreasing ($M = -1.86$; $SD = 4.48$). In our sample, French *Le Monde* was the most successful player with an increase of 12.08 %, while *Ekstra Bladet* in Denmark saw the strongest decline of -10.88 %.

4.3 Analysis

Based on supply-side characteristics, we distinguished three types of news outlets in our sample: dailies ($n = 18$); weeklies ($n = 6$); and free media ($n = 9$). Dailies publish printed papers every day, relying on the revenue from the audience and the advertising market. Weeklies print an issue once a week, also relying on the revenue from the two markets. Free media, on the other hand, solely depend on the revenue from advertising. As business models differ, we look at these three subsamples separately. This approach is supported by literature defining free media as a distinct strategic group of news outlets (Russi, 2013).

Consequently, we calculated correlations in SPSS for every sub-sample independently, using Spearman's rank correlation coefficient (Spearman's rho). It is a nonparametric measure of dependence between two variables (e.g., overall market orientation and success), and hence, it is well-suited to answer our research questions. The results are reported in the following section.

5 Results

5.1 Overall market orientation and success

Overall market orientation is rated higher for weeklies ($M = 4.20$; $SD = 0.84$) than for free media ($M = 4.11$; $SD = 0.84$) and dailies ($M = 3.75$; $SD = 0.97$). Its correlation with success in terms of change of circulation from 2010 to 2011 is weak ($RQ\ 1$; see Table 6). Market-oriented dailies are more successful than their less market-oriented counterparts ($r_s = 0.16$; n.s.). For weeklies and free media, the opposite is true ($r_s = -0.11$; n.s. and $r_s = -0.29$; n.s.). However, these results are not statistically significant.

Results

Table 6: News outlets' overall market orientation and its correlation with success

Type	Item	Mean (SD)	r_s
Dailies (n = 20)	Shrewdly judged action to uphold readers and stakeholder interests	3.75 (0.97)	0.16
Weeklies (n = 5)	Shrewdly judged action to uphold readers and stakeholder interests	4.20 (0.84)	-0.11
Free media (n = 9)	Shrewdly judged action to uphold readers and stakeholder interests	4.11 (0.60)	-0.29

Five-point Likert scale (1 = not important to 5 = very important); Spearman's-Rho;

** $p < 0.01$; * $p < 0.05$; ° $p < 0.1$

5.2 Reader orientation and success

Reader orientation is rated highest for free media ($M = 3.49$; $SD = 0.76$) compared to weeklies ($M = 3.30$; $SD = 0.99$) and dailies ($M = 3.27$; $SD = 0.57$).

However, reader-oriented dailies are more successful than less reader-oriented news outlets (*RQ 2*; see Figure 2). Spearman's rho shows a moderate correlation between the reader orientation index and the change of circulation from 2010 to 2011 ($r_s = 0.51$; $p < 0.05$; see Table 7). When examining the different means of reader orientation, responses from readers are rated as most important ($M = 3.89$; $SD = 1.08$), followed by readership research ($M = 3.56$; $SD = 0.92$), private contacts ($M = 3.24$; $SD = 0.90$), and colleagues' reports ($M = 3.17$; $SD = 0.86$). Finally, academic research is least important ($M = 2.82$; $SD = 0.95$). Out of these five methods of researching the audience, private contacts shows a moderate correlation with success, which is statistically significant ($r_s = 0.48$; $p < 0.05$). Although the other correlations are also positive, they are not significant. Market research is the only exception ($r_s = -0.21$; n.s.).

Results

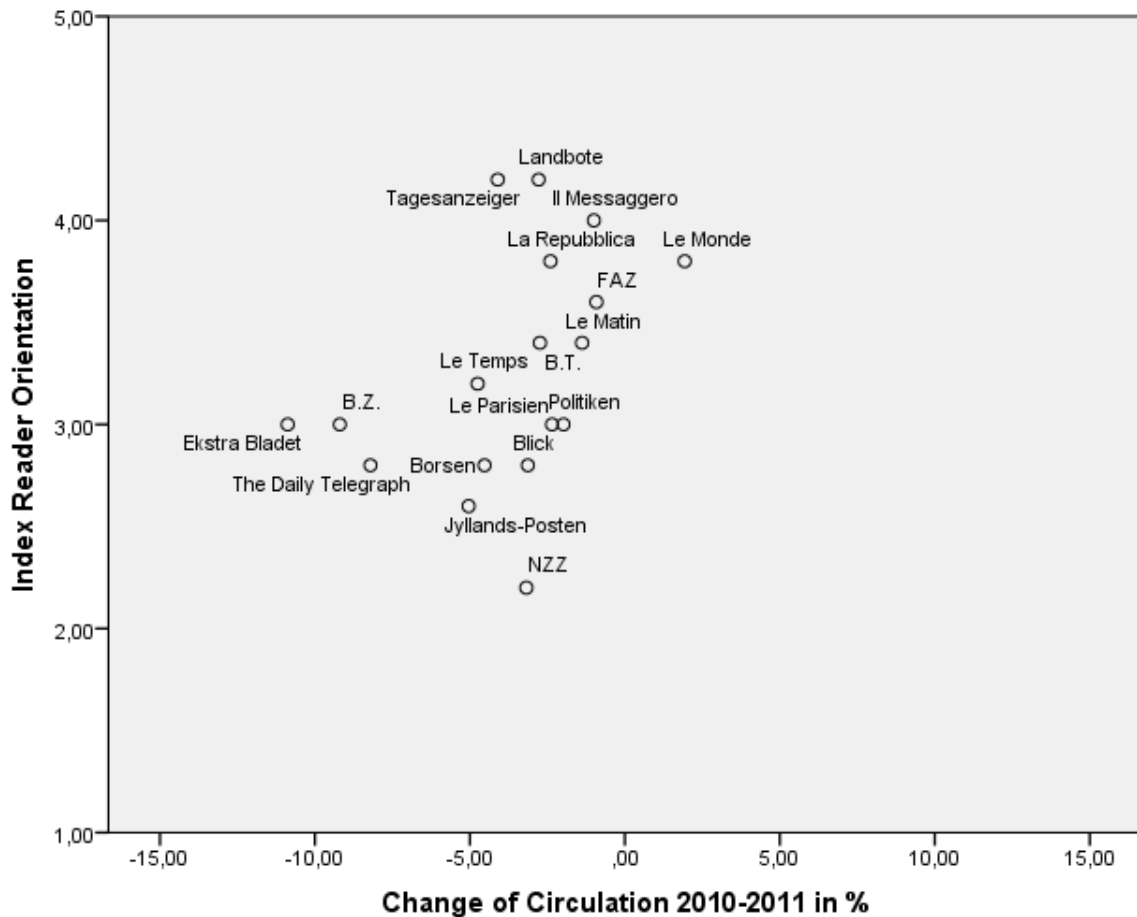


Figure 2: Reader orientation and circulation (2010–2011) of dailies

The weeklies' reader orientation index shows a strong, negative correlation with success ($r_s = -0.81$; $p < 0.05$; see Table 7). Less reader-oriented news outlets see a better development of their circulation than their more reader-oriented counterparts (see Figure 3). For instance, the two least successful news outlets, *Le Matin Dimanche* and *Sonntagszeitung*, with a decline in circulation of -6.88% and -3.58% , respectively, rate reader orientation the highest. By investigating the different means of researching the readership, we find that, also for weeklies, the responses from readers are the most important ($M = 4.33$; $SD = 0.82$), followed by private contacts ($M = 3.33$; $SD = 1.21$), colleagues' reports ($M = 3.00$; $SD = 1.55$), and readership research ($M = 3.00$; $SD = 1.41$), which is a different ranking compared to dailies. Again, academic research ($M = 2.82$; $SD = 1.33$) plays a minor role. All of the correlations with success are negative, out of which two are strong and statistically significant: colleagues' reports ($r_s = -0.79$; $p < 0.1$) and readership research ($r_s = -0.78$; $p < 0.1$).

Results

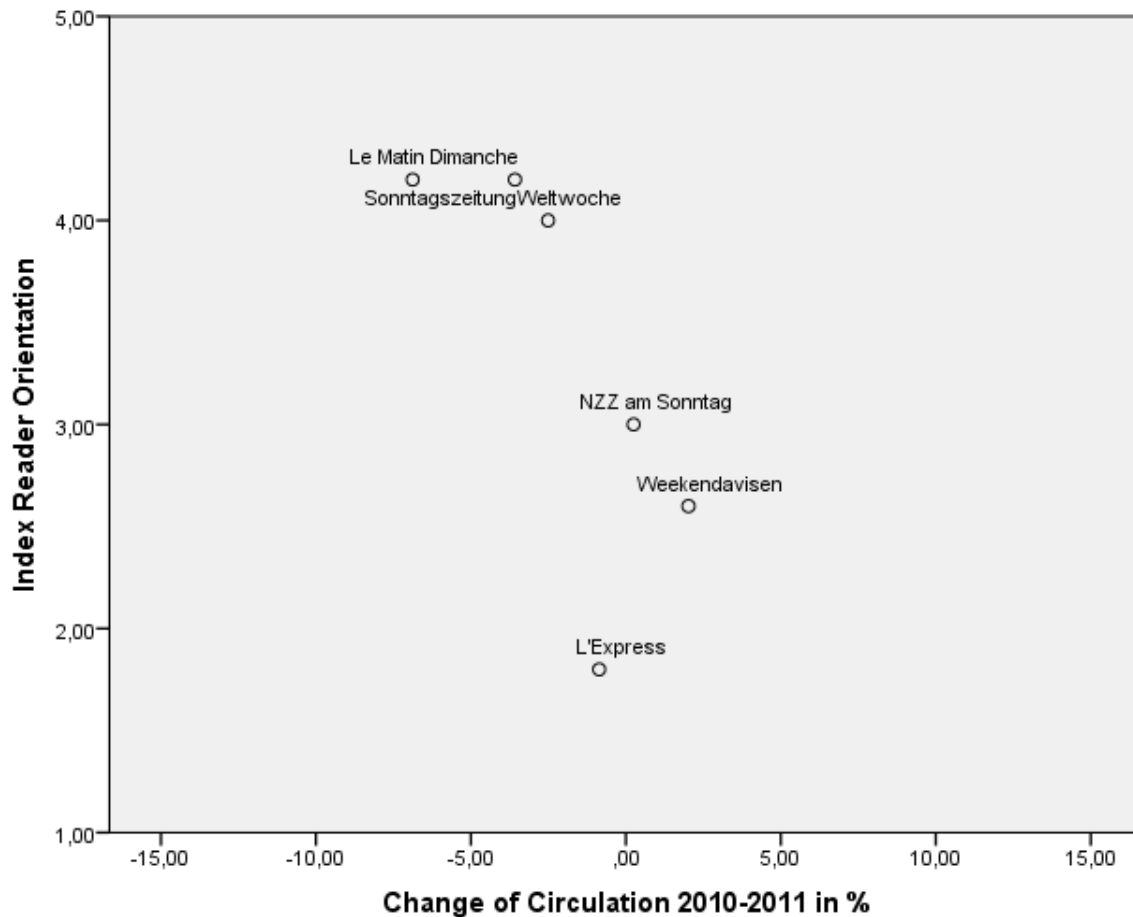


Figure 3: Reader orientation and circulation (2010–2011) of weeklies

Free media do not show a significant correlation between the reader-orientation index and success in terms of change of circulation from 2010 to 2011 (see Figure 4 and Table 7). For instance, two French news outlets, *20 Minutes* and *Metro*, vary greatly in their reader orientation, while both were able to increase their circulation by 12.80 % and 11.90 %, respectively. However, free media show less variance and rate reader orientation higher than the other types of media ($M = 3.49$; $SD = 0.76$). Similar to dailies and weeklies, responses from the readers are the most important, whereas academic research is the least important ($M = 3.89$; $SD = 1.05$ and $M = 3.00$; $SD = 0.71$).

Results

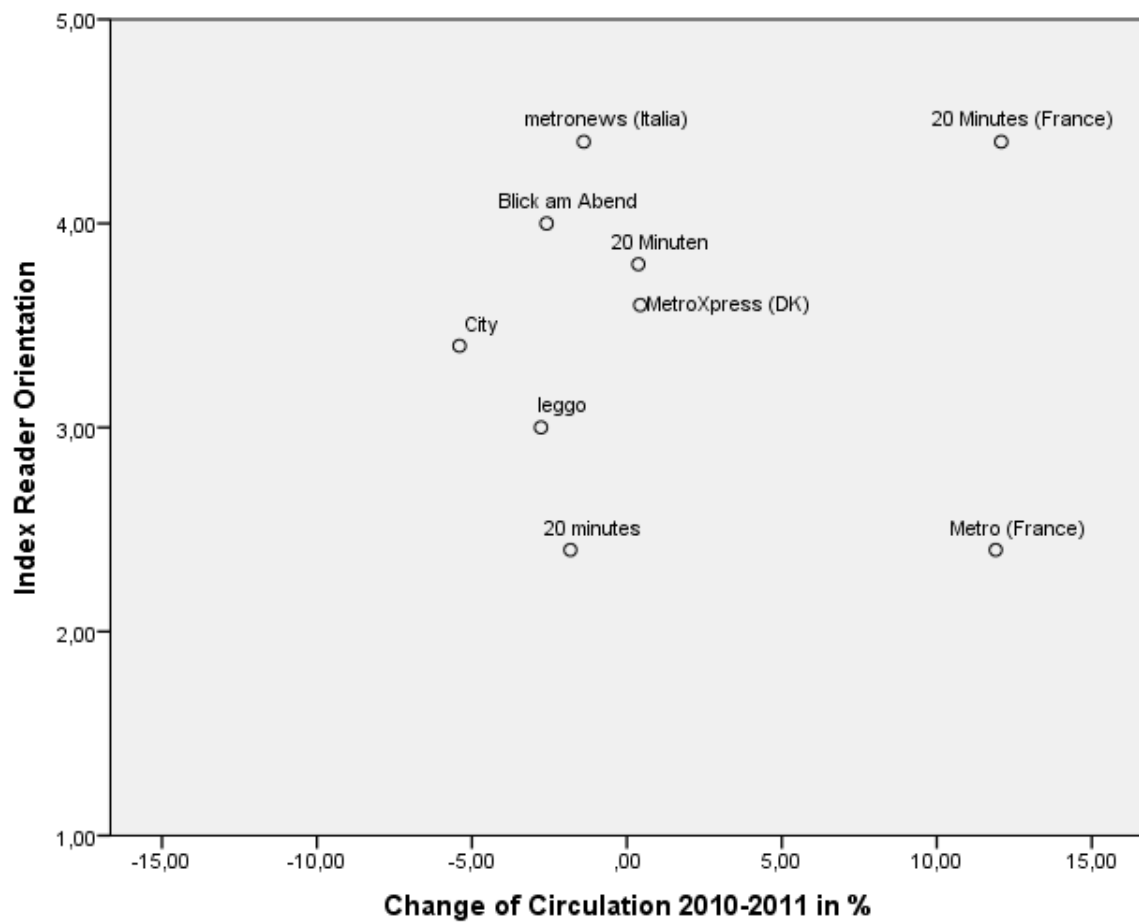


Figure 4: Reader orientation and circulation (2010–2011) of free media

Table 7: News outlets' reader orientation and its correlation with success

Type	Item	Mean (SD)	r_s
Dailies (n = 18)	Private contacts with individual readers	3.24 (0.90)	0.48 °
	Colleagues' reports on your readers	3.17 (0.86)	0.10
	Responses from your readers (e.g., readers' letters)	3.89 (1.08)	0.31
	Readership/audience research and/or opinion polling	3.56 (0.92)	-0.21
	Academic communication research	2.82 (0.95)	0.22
	Index reader orientation	3.27 (0.57)	0.51 *
Weeklies (n = 6)	Private contacts with individual readers	3.33 (1.21)	-0.71
	Colleagues' reports on your readers	3.00 (1.55)	-0.79 °
	Responses from your readers (e.g., readers' letters)	4.33 (0.82)	-0.12
	Readership/audience research and/or opinion polling	3.00 (1.41)	-0.78 °
	Academic communication research	2.83 (1.33)	-0.29
	Index reader orientation	3.30 (0.99)	-0.81 *
Free Media (n = 9)	Private contacts with individual readers	3.33 (1.23)	0.26
	Colleagues' reports on your readers	3.33 (1.00)	0.74
	Responses from your readers (e.g., readers' letters)	3.89 (1.05)	0.33
	Readership/audience research and/or opinion polling	3.89 (1.17)	-0.02
	Academic communication research	3.00 (0.71)	-0.07
	Index reader orientation	3.49 (0.76)	0.24

Five-point Likert scale (1 = not important to 5 = very important); Spearman's-Rho;

** p < 0.01; * p < 0.05; ° p < 0.1

5.3 Competitor orientation and success

According to Table 8, means of competitor orientation do not show a clear pattern. For dailies, an editorial strategy of differentiation is rated as most important ($M = 4.39$; $SD = 0.67$). However, it is negatively correlated with success ($r_s = -0.25$; n.s.). For the analysis of competitors' strengths and weaknesses, the correlation is also negative ($r_s = -0.20$; n.s.). Only a swift reaction to competitors' initiatives is positively correlated with success, which is the single statistically significant result ($r_s = 0.43$; $p < 0.1$).

However, weeklies' swift reaction to competitors' initiatives shows a strong, negative correlation ($r_s = -0.89$; $p < 0.05$). The analysis of competitors' strengths and weaknesses is rated as equally important and it also shows a strong, negative correlation which is not significant ($r_s = -0.80$; n.s.). Moreover, an editorial strategy of differentiation is positively correlated with success, but not statistically significant ($r_s = 0.41$; n.s.).

In terms of the direction of correlations, free media are the opposite of dailies. An editorial strategy of differentiation ($r_s = 0.51$; n.s.) and the analysis of competitors' strengths and weaknesses ($r_s = 0.09$; n.s.) are positively correlated, while a swift reaction to competitors' initiatives shows a negative correlation ($r_s = -0.11$; n.s.). However, the results for free media are again not statistically significant.

Table 8: News outlets' competitor orientation and its correlation with success

Type	Item	Mean (SD)	r_s
Dailies (n = 21)	Editorial strategy of differentiation from competitors	4.38 (0.67)	-0.25
	Analysis of competitors' strengths and weaknesses	3.48 (0.81)	-0.20
	Swift reaction to competitors' initiatives	3.65 (0.99)	0.43 °
Weeklies (n = 6)	Editorial strategy of differentiation from competitors	4.67 (0.52)	0.41
	Analysis of competitors' strengths and weaknesses	3.00 (1.10)	-0.80
	Swift reaction to competitors' initiatives	3.00 (1.41)	-0.89 *
Free Media (n = 9)	Editorial strategy of differentiation from competitors	4.33 (0.87)	0.51
	Analysis of competitors' strengths and weaknesses	3.11 (0.78)	0.09
	Swift reaction to competitors' initiatives	3.67 (1.00)	-0.11

Five-point Likert scale (1 = not important to 5 = very important); Spearman's-Rho;

** p < 0.01; * p < 0.05; ° p < 0.1

In the following section, the results for overall market orientation, reader orientation and competitor orientation will be discussed in detail.

6 Discussion

The **overall market orientation** (RQ 1) of dailies, weeklies, and free media is weak and not significantly correlated with their success. This finding is rather surprising when compared to prior research in other industries (Luca et al., 2010). However, Beam (2001) could not find a direct effect of market orientation on higher circulation and household penetration. His study only shows a positive influence through senior editors from market-oriented newsrooms expressing less uncertainty about their environment and being more confident that they can adapt to changes.

In terms of **reader orientation** (RQ 2), the results were inconclusive across the three types of news outlets that we investigated. For dailies, emphasis on researching the readership pays off with success, whereas weeklies show a negative correlation between reader orientation and change of circulation from 2010 to 2011. Since they have fewer resources because of the weekly frequency, they may be better off by focusing their efforts in other areas. The results for free media were not significant. However,

they rated reader orientation the highest, which is counterintuitive since they are the only news outlets solely relying on advertising revenues. Free media was also identified as a distinct strategic group in prior studies (Russi, 2013). Our findings add to this literature and suggest dailies, weeklies, and free media being three different types of news outlets, which call for different approaches towards reader orientation and media management.

Regarding the different means of researching the readership, responses from readers are the most important. This is interesting since it is the only “push” option, while all of the other methods need the news outlet’s initiative. In line with this, the most abstract and hence, the most difficult information to process received the lowest ratings of importance: academic research.

When examining the cases in our sample in more detail, the large differences between the Swiss *NZZ* and *Tagesanzeiger* are found to be interesting as they both define themselves as producers of quality news. While *Tagesanzeiger* achieves high scores on the reader orientation index, *NZZ* seems to place few resources into researching the readership. The reason may be the positioning of *NZZ* as a traditional, conservative news brand catering to a very specific target group (Trevisan, 2003). However, even this prestigious news outlet is rethinking its strategy. As *NZZ*-CEO Veit Dengler confirms, data analysis is crucial for understanding and keeping customers (Hollenstein, 2014). Correspondingly, they are including readers’ feedback in their ongoing development process (Trossman & Cueni, 2014). The difference between *NZZ* and *Tagesanzeiger* is also visible in their Sunday outlets *NZZ am Sonntag* and *Sonntagszeitung*. While the latter rates reader orientation high, the former sees it as less important. However, *NZZ* has increased its activities in the field and even hired a team for data analysis (Klein Report, 2014). *FAZ*, which holds a similar position to *NZZ* in Germany, rates reader orientation as more important; however, Tobias Trevisan, its managing director at the time of the interviews, calls for more market research in the media in general (Persoenlich.com, 2013). Amongst free media, the case of *20 Minuten* and *20 Minutes* (Switzerland) is particularly interesting. While methods of researching the audience are very important for the German language edition, they play a less important role in French-speaking Switzerland, even though both news outlets are owned by *Tamedia*. However, *20 Minutes* (France)—still published by its original owner *Schibsted*—values reader orientation the most. Therefore, we can conclude that these similar concepts are implemented differently, which is surprising since they are based on the duplication of a proven business model (Helgesen, 2002).

The results for the **competitor orientation** (RQ 3) of dailies, weeklies, and free media were also inconsistent. The respondents rated editorial strategy of differentiation the highest, which is in line with Kind et al. (2009), who suggest that it determines the split between audience and advertising

revenue. However, the analysis of competitors' strengths and weaknesses is regarded as considerably less important, which is contradictory. One can argue that differentiation only succeeds if based on a sound analysis of other players in the market. For a swift reaction to competitors' initiatives, we see significant correlations with the success of dailies and weeklies. The formers' relationship is positive, which is in line with market-orientation literature. Especially in times of digitalization and convergence, competition is a key topic. It no longer stands for other traditional news outlets, since competitive pressure from other types of media is increasing (Grönlund & Björkroth, 2011; Sommer & von Rimscha, 2014). For weeklies, a swift reaction to competitors' initiatives shows a negative correlation with success. This is counterintuitive to the findings in the literature. However, it is in line with our results for reader orientation. Accordingly, for weeklies, it is best to be reluctant to influences from the news outlet's environment. This adds to the need for different media management strategies depending on the type of news outlet.

Amongst the cases in our sample, the Italian papers *La Repubblica* und *Il Messaggero* are particularly focused on the area of competitor orientation as they rated the items high. This may be related to Italy's extremely competitive media landscape with numerous titles. Regarding competitor orientation, *NZZ* and *FAZ* follow similar approaches. Compared to reader orientation, competitor orientation is more important for *NZZ*, but less important for *FAZ*.

Our findings show that market orientation in the media is different from other industries. More specifically, relationships to success are less systematic and the directions of correlations are different depending on the type of news outlet. This may be caused by mutual influences through potentially conflicting market intelligence about media outlets' two groups of customers and different business models. In addition, media professionals have a tradition of focusing on their own judgment and being very resistant to influences from the media outlet's environment (Deuze, 2008; Loosen & Schmidt, 2012). Regarding the advertising market, we assume that generating, disseminating and responding to market intelligence is considered of lower importance and performed less frequently than researching audiences. As argued earlier, media outlets need an audience first which they can offer to advertisers and advertisers are better served when a media outlet knows its audience well (Perez-Latre, 2007). The significance ascribed to audiences and advertisers depends on the news outlet's business model and revenue streams. In regard to the competition, news outlets follow the long-term strategy of editorial differentiation. They also place less emphasis on a swift reaction to competitors' initiatives and the analysis of their strengths and weaknesses, which are rated rather low. This could mean that these processes are more informal rather than systematically implemented.

7 Limitations and further research

This exploratory study of news outlets provides an initial investigation of the relationships of overall market orientation, reader orientation, and competitor orientation to success in terms of change of circulation. The key limitation is the small number of cases per country and the small sample size altogether. Especially, our results for free media and weeklies have to be treated warily. In order to strengthen the findings, it would be necessary to investigate other influences on a media outlet's success. Using circulation data as its measure allowed us to compare across countries; however, it does not cover a media outlet's performance in other means of distribution. However, it is related to success online (Illenberger, 2013). Unfortunately, revenues or profits are largely unavailable figures in the news industry. Another aspect that has to be taken into account is that our findings simply rely on the perception of media professionals. However, since the "true" processes of market orientation are inaccessible, the accounts of the involved individuals serve as suitable proxies.

Since this study was conducted within a multidisciplinary research project, it is not the complete and rigorous investigation of market orientation in the media, which is needed. In addition to audiences and competitors, the advertising side has to be analyzed in more detail. The two-sided market is what makes the media special and different from other industries. Considering advertisers and audiences at the same time is the major challenge for media outlets. Future studies should apply case studies to investigate different approaches as well as standardized methods to quantify the effects of market orientation. In doing so, market orientation can be put into perspective by identifying its importance in relation to success factors in the media. Since our study points out the differences compared to other industries as well as within the media industry, it is a promising field for further research. Audience, advertiser and competitor orientation require further investigation.

8 Conclusion

When applying market orientation theory to the media, we see differences to other industries. Our study suggests that its relation to success depends on the type of news outlet and it is not necessarily positive. This adds to the literature highlighting the limited transferability of findings from other industries to the media (Dogruel, 2014). In two-sided markets in general, mutual influences between

two groups of customers and competitors have to be considered when applying any theory. Accordingly, dynamic capabilities need to be specified for the media and other two-sided markets.

The results of our study show that dailies, which emphasize reader orientation and a swift reaction to competitors' initiatives, are more successful in terms of change of circulation. For weeklies, the opposite is true. Rating means of researching the readership and responsiveness to the competition low is associated with success. These findings call for different media management strategies depending on the type of news outlet:

- Since reader orientation is important for the success of dailies, media managers should place more emphasis on this area and provide the necessary resources. Especially in current times of ubiquitous digital media, data can be easily gathered in multiple ways. Journalists, of course, should make use of these opportunities in order to know their audience well. Regarding a swift reaction to competitors' initiatives, products and services have to be continuously improved to meet the highest standards. In times of uncertainty and change, being flexible and innovative in journalism and management is crucial.
- For weeklies, media managers should primarily focus on the news outlet; for instance, the media brand, rather than its environment. Reader orientation and responding to competitors need to be limited. The same holds true for journalists who should concentrate on their professional judgment.
- Market orientation and free media's success are not significantly correlated. This finding adds to the literature defining dailies, weeklies, and free media as different types of news outlets. Therefore, not only timeliness, routines, and production processes are different but also market orientation. These differences have to be taken into consideration in media practice; for instance, when adjusting the business model and defining the strategy.

With media outlets investing in resources for market orientation (Persoenlich.com, 2014), its potential is increasing. Data must not only be generated, but it must also be disseminated and responded to in a timely manner. Understanding and addressing customers' needs is crucial in times of digital disruption. Thus, media outlets need to coordinate their efforts in audience and advertising markets. Moreover, they have to determine how to relate their informal investigations and traditional market research with comments on their website and social media. At the same time, media outlets have to monitor the competition as well as look at potential future competitors. Unlike in the past, they do not only have to rival with legacy media but also with technology-based startups. Therefore, media outlets need to

develop their market orientation capabilities to innovate and improve products and services to compete in the marketplace of tomorrow.

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Sommer (2016): Market Orientation of News Startups

On the importance of users, businesses, and competitors when launching new products and services.

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Abstract

The media industry is undergoing major disruptions, which foster innovation; however, this makes starting a new business particularly difficult. In this unstable environment, theory suggests market orientation as being important for success. Based on four case studies of early stage news startups, this study investigates the processes and practices of market orientation in the media. The results show that startups generate market intelligence in various ways and, in doing so, they prioritize the markets. Most of the attention has been dedicated to learning about users, while placing less effort on examining businesses and competitors. Overall, market orientation seems to have a positive influence on news startups' survival and support innovation.

1 Introduction

The media industry is undergoing major disruptions, forcing media outlets to innovate (McKelvie & Wiklund, 2008). The audience's consumption patterns are changing, advertisers budgets are shifting, and new competition is arising in the form of tech companies. This unstable and uncertain environment makes starting a new business and bringing a new service to the market difficult. In doing so, market orientation theory suggests that customer orientation, competitor orientation, and interfunctional coordination are important for success (Jaworski & Kohli, 1993; Narver & Slater, 1990).

However, there is limited research on market orientation in news media. The findings from other industries are difficult to transfer because of media's distinct characteristics (Dogruel, 2014). Prior studies have focused on traditional media outlets and a journalism standpoint (Beam, 2001; Sommer & Krebs, 2016; Tandoc & Ferrucci, 2014), while an analysis of news startups from a media management perspective is still missing. They have been widely neglected by researchers but are potentially most innovative (Achtenhagen, 2008; Compaine & Hoag, 2012; McKelvie & Wiklund, 2008).

Consequently, the present study focuses on market orientation at news startups. The goal is to explore and analyze the practices and processes of market orientation in new and young media outlets in the fields of content creation, curation and aggregation, which compete with traditional players in serving the audience's needs for information. It is also investigated how market intelligence is generated and used on the basis of four case studies of early stage startups.

First, this study provides a comprehensive literature review, connecting market orientation theory with the media industry. Second, it assesses the construct's importance for new product development and innovation to explore news startups. The method section describes the case study approach in further detail. Subsequently, Results are summarized and discussed. Finally, implications for further research are presented followed by the conclusion.

2 Literature Review

Market Orientation Theory

Market orientation "is the organizationwide *generation* of market intelligence pertaining to current and future customer needs, *dissemination* of the intelligence across departments, and organizationwide *responsiveness* to it" (Kohli & Jaworski, 1990, p. 6). Following Narver and Slater (1990), market orientation consists of three behavioral components, customer orientation, competitor orientation, and

interfunctional coordination which are important for long-term profit (Narver & Slater, 1990). Originally, the cultural (Kohli & Jaworski, 1990) and the behavioral (Narver & Slater, 1990) perspective have been distinguished. While the former defines market orientation as a mindset and corporate culture of the organization, the latter focuses on concrete instruments, tools, and behaviors. However, the two conceptualizations share many underlying concepts (Noble et al., 2002) and they are very similar in their operationalization (Cadogan & Diamantopoulos, 1995). Consequently, they have been combined in more recent studies (Baumgarth, 2009a; Bridson & Evans, 2004; Homburg & Pflessner, 2000). Market-oriented companies are characterized through capabilities such as collecting knowledge regarding the needs and processes on the customer side (Danneels, 2002; Day, 1994). They also learn about their environment through the analysis of strengths and weaknesses as well as emerging markets and competitors (Narver & Slater, 1990; Slater & Narver, 1995). In order to succeed, this information is shared across functions and the use of resources is coordinated to create superior value for the customer (Narver & Slater, 1990).

Prior research on market orientation assumed that it was a key factor in times of uncertainty (Jaworski & Kohli, 1993; Li & Calantone, 1998). Wren et al. (2000, p. 602) add to this argument by stating: "There is research to suggest that the skills that comprise market orientation (organizational support/systems, market knowledge, interconnectedness, etc.) are more important in industries characterized by rapid technology change, competitive intensity, and market uncertainty."

Uncertainty is particularly high when starting a new business or developing a new product or service. Market-oriented companies are in touch with the market, they have a better understanding of their customers' wants and needs, and possess a greater knowledge of the competition and trends in the market place, which allows them to maximize the probability of success when developing and introducing new products (Wren et al., 2000). Hong et al. (2013) find a positive effect of market orientation on new product performance. Wong and Tong (2012) explicitly look at the influence of customer and competitor orientation. They find that both have a significant positive effect on new product success.

For new businesses and products, the relationship of market orientation and innovation is extremely important. While some scholars argue that market orientation has negative consequences as it leads to the creation of "me-too" products, others claim that it is crucial for successful innovation and organizational performance (Atuahene-Gima, 1996; Ordanini & Maglio, 2009). To resolve this controversy, Atuahene-Gima (1996) shows market orientations' effect on innovation characteristics such as product newness (negative), innovation fit (positive), product advantage (positive), and

interfunctional teamwork (positive) as well as a positive relationship between market success and project impact performance. Han et al. (1998) provide evidence that market orientation facilitates an organization's innovativeness, which, in turn, positively influences its business performance. A meta-analysis of independent studies points in the same direction, attesting that overall market orientation as well as customer orientation, competitor orientation, and interfunctional coordination positively affect innovation consequences (Grinstein, 2008).

Media Industry and Startups

In the media industry, the environment is particularly turbulent (Achtenhagen, 2008; McKelvie & Wiklund, 2008). Digitalization and technology lead to high uncertainty about the future of news and the need for innovation (Kaye & Quinn, 2010; van Weezel, 2010). New ideas and ventures have emerged within traditional media companies (Achtenhagen, 2008; Hass, 2011) or formed as startups. Examples such as *Buzzfeed*, *The Huffington Post*, and *Vox Media* show that the latter can be very innovative and successful within a short period of time. However, there is little research on entrepreneurship and new businesses in the news media industry.

In recent decades, entrepreneurship is not a concept that is closely identified with the media (Compaine & Hoag, 2012). The vast majority of scholarly work in the field of media management has been conducted around large firms. Entrepreneurial behaviors of individuals as well as entrepreneurial activities and processes of startups are widely neglected (Achtenhagen, 2008; McKelvie & Wiklund, 2008; Naldi & Picard, 2012). Despite the limited number of publications, the field of research has a strong relevance to media management (Hang & van Weezel, 2007).

Studies show that small organizational size does not imply small capabilities (Davis, Vladica, & Berkowitz, 2008) and that firms of all shapes and sizes can be innovative (McKelvie & Wiklund, 2008). Conversely, new firms tend to challenge established companies by providing radical innovations that change the market, and in some cases, they even create new industries. From a societal and industrial perspective, it is shown that new and young firms generate economic growth and the majority of new jobs (Audretsch, 1995; McKelvie & Wiklund, 2008). In addition, Achtenhagen (2008, p. 138) argues that "media entrepreneurs play the role of change agents in society by engaging in a process of continuous innovation, adaption, and learning." According to Compaine and Hoag (2012), a vibrant and innovative media sector is also important for democracy. Consequently, startups deserve closer attention to gain an in-depth understanding of the media industry as a whole (Achtenhagen, 2008;

McKelvie & Wiklund, 2008). Hang and van Weezel (2007) detect a growing demand for research in this field.

Applying Market-Orientation Theory to News Startups

When investigating market orientation in the media, one must consider the unique characteristics of media products and services, which restrict the direct transfer of any theory to the field of media (Dogruel, 2014). First and foremost, media outlets have to serve audiences and advertisers at the same time (Wildman, 2006). The two-sided markets concept points out their business model (Anderson & Gabszewicz, 2006; Rochet & Tirole, 2006). One or several platforms enable interactions between end users. Changes in a first market always affect the second one, and vice versa. In this scenario, network effects are particularly important as they are two-sided as well (Eisenmann, Parker, & Van Alstyne, Marshall W., 2006; Varian, Farrell, & Shapiro, 2011). Accordingly, individuals and advertisers benefit from a news outlet's growing audience, and the audience benefits from the advertisements. The markets' relationships show in an increase in reader demand, which results in an increase in advertising rates. Meanwhile, an increase in advertising demand leads to a decrease in cover prices (Kaiser & Wright, 2006). Regarding competitors, Kind et al. (2009, p. 1112) find that "the scope for raising revenues from consumer payment is constrained by other media firms offering close substitutes" and that "a media firm's scope for raising revenues from ads, on the other hand, is constrained by how many competitors it faces."

This results in the need to adapt the market orientation model, which has been applied to the two-sided market scenario by Sommer and Krebs (2016). Market-oriented media outlets generate, disseminate, and coordinately respond to market intelligence on audiences, advertisers and competitors to be successful. As advertisers pay for access to audiences and audiences benefit from advertisements being informative and contributing to revenues, the audience market and the advertising market are connected. Depending on the media outlet's business model and the markets' importance for its incomes, one group of customers is potentially favored over the other. Audiences' relationships to competitors are determined by the availability of substitutes and other players attempting to reach the same target group. The advertising market is also connected to the competition. While advertisers might find substitutes elsewhere, competitors aim for a share of the advertising market. Overall, market orientation should positively influence a media outlet's success.

Beam has contributed much to the field of market orientation in the media. His studies investigate its relationship to environmental uncertainty (Beam, 1996), journalistic values (Beam, 1998), success in terms of higher circulation and household penetration (Beam, 2001), and content differences (Beam, 2003). Throughout his research, which focuses on the audience market, he points out the differences between newspapers with a weak market orientation and those with a strong market orientation, such as senior editors from market-oriented newsrooms expressing less uncertainty about their outlet's environment and feeling more confident about adapting to changes in its environment (Beam, 2001). However, findings in Sommer and Krebs (2016) are contradictory: while dailies' reader orientation is positively correlated with success in terms of change of circulation, the opposite holds true for weeklies.

Market research in media practice also tends to focus on the audience side. Informal ways to collect information include private contacts, colleagues' reports, and readers' feedback (Weaver, Beam, Brownlee, Voakes, & Wilhoit, 2007). While observations and experiments are rare, news outlets use tools such as surveys and focus groups quite frequently (Beam, 1995). In recent times, the analysis of online and social media data has attracted considerable attention (Anderson, 2011, 2013; Christin, 2014; Dick, 2011; Graves & Kelly, 2010; Lee et al., 2014; Tandoc, 2014a, 2014b; Vu, 2014). Tandoc and Ferrucci (2014) investigate web analytics and find the adoption of such practices being further developed in market-oriented newsrooms. While journalists see advantages in these new opportunities to learn more about audiences, their preferences, and their liking of the news, they are also concerned about the integrity and values of journalism. This has resulted in a potential conflict between what the audience actually wants versus journalists' judgment of newsworthiness (MacGregor, 2007; Tandoc & Thomas, 2014). However, at least on the journalism side, there appears to be a lack of systematization, especially in terms of how to use audience metrics (Usher, 2013).

Other studies have focused on advertisers and competitors. Habann (2010) identifies advertisers accepting a new media product as a success factor of media innovations. Wirtz et al. (2011) study the drivers of advertising sales and find that marketing competencies such as market observation, identification of market opportunities, and utilization of market opportunities have a positive effect on advertising revenue. Compared to other players, media outlets have to offer an advantage to their customers to be successful (Bleis, 1996). Monitoring competitors also has a positive influence on a media innovation's success (Habann, 2010). Numerous studies focus on the influence of competition on content and advertising (e.g., Becker et al., 2009; Coulson & Lacy, 1996; Lacy, 1987; Shaver & Lacy, 1999). Research also finds that media outlets respond to competition, for instance, through release strategies, product differentiation, and increasing expenditures (Krider & Weinberg, 1998; Lacy & Martin, 2004;

Lee & Han, 2006; Shrikhande, 2001). For dailies, a swift reaction to competitors' initiatives is positively related to success, while it is again the opposite for weeklies (Sommer & Krebs, 2016).

In addition to the two-sided market, media products have characteristics, such as being experience goods, public goods, and cultural goods, which makes them in their unique combination different to non-media products (Chan-Olmsted, 2006c; Craig, 2013; Doyle, 2013; Sommer, 2015). As news and journalism fulfill certain functions for society, market orientation in news media is often criticized (Cohen, 2002; McManus, 1994). Traditional news outlets such as *The New York Times* feel obligated to respect their journalistic judgment, certain standards, and high-quality reporting, while other news outlets are more prone to follow the market; the boundaries are less clear especially in online media. Especially online, boundaries are less clear. Currah (2009) worries about news publishers fighting for clicks, consumer eyeballs and advertising revenue, as it puts them in danger of becoming "digital windsocks" and losing journalism's professional integrity. Customization of news raises concerns about eroding the social cohesive role of mass media (Domingo, 2008). However, new competitors with a focus on technology, such as news aggregators, may not share such worries.

From reviewing the literature, it is possible to conclude that market orientation in the media is potentially different than that in other industries because of media outlets' need to address two markets and the media's importance for culture and society. Studies so far have focused on certain components of the market orientation model, while a comprehensive analysis of market orientation from a media management perspective is still missing. In their first exploratory study, McKelvie and Wiklund (2008) show that knowledge acquisition practices of new and young media outlets are the largest explanatory factors for both product and customer innovation. The authors argue that investing time and resources in both market-oriented and technology-oriented knowledge pays off in innovative output, which is particularly important for new venture performance. However, till date, the literature has not addressed how this knowledge on audiences, advertisers, and competitors is actually used (McKelvie & Wiklund, 2006). In addition, the two-sided market concept and network effects have not been accounted for in sufficient detail. In a recent study, Bruno and Nielsen (2012) examine the performance of journalism startups that create, curate, and/or aggregate content. They highlight their diverse revenue streams and define success as survival, which leads to the need for specification of the market orientation model for news startups (see Figure 1). News startups have to generate, disseminate, and coordinately respond to market intelligence about (1) their *users* to whom they provide created, curated and/or aggregated content; (2) *businesses* for which they offer advertising opportunities and other services; and (3) *competitors*. As a result, market orientation should positively influence their *survival*.

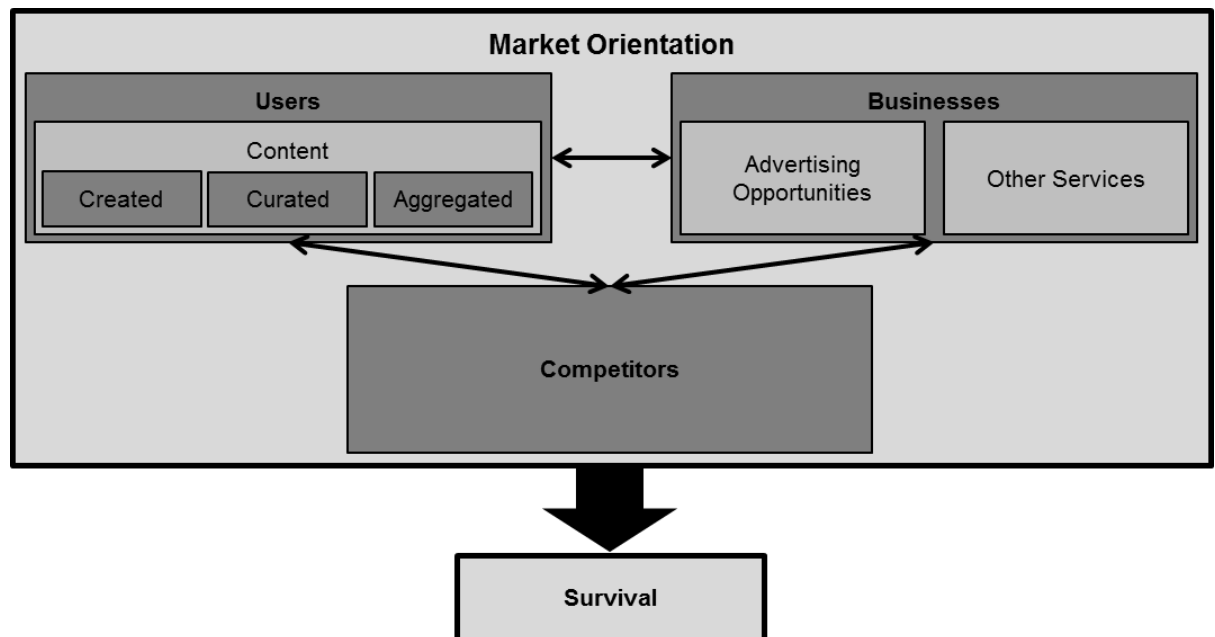


Figure 1: Market orientation of news startups

Therefore, the present study focuses on the processes regarding market orientation in news startups. As shown above, market orientation is potentially different in the media as compared to other industries. Till date, research has focused on traditional media outlets and the audience side. Moreover, little is known about the role of market orientation when starting a new media business from a media management perspective. Following the literature review, it is expected that market orientation will be particularly important for news startups as well as startups being more innovative and experimental in this area. This study aims to explore and analyze the practices and processes of market orientation in new and young media outlets. In addition, it will relate the findings to practices in traditional media outlets as described in the literature, which are potentially different because of their maturity, size, and journalistic values.

3 Method

Case Study and Case Selection

To investigate market orientation of news startups, this study follows a case study approach, which offers an in-depth look at what roles users, businesses, and competitors play for new and young media outlets. Case studies are well-established in media management research (Hollifield & Coffey, 2006;

Method

von Rimscha & Sommer, 2016). They combine different types of data collection such as desk research and interviews. Access to several startups founded in recent years was gained through the Tow-Knight Center for Entrepreneurial Journalism. Following Yin's (2009) recommendation to analyze more than one case to strengthen the findings, four startups were selected (see Table 1).

In doing so, the criteria balance, variety, and opportunity to learn were considered (Stake, 1995). All of the startups offer news to their users and they are in similar stages at the time of this study, which is the foundation of a balanced sample. However, they differ in terms of content (creation, curation, and/or aggregation), target group (users and/or businesses), and revenue stream(s) (subscriptions, advertising, and/or other services). Hence, the four selected cases allow this study to cover a variety of news startups. Opposed to examining typical cases, this approach provides an opportunity to identify a wider range of practices and increase generalizability (Flyvbjerg, 2006). Consequently, the goal is not to compare cases, but to formulate a cross-case synthesis; therefore, they were studied within their contexts (Yin, 2009).

Ada is a technology news service for women, funded through advertising and syndication deals with traditional media. *Go Baller* aggregates sports content for sports fans and offers sports brands a platform where their content from all over the web is put in one place. *Informrly* provides personalized industry news through a newsletter and a subscription based mobile app. *Upstrt* is a free e-mail newsletter, delivering the most relevant news on the Internet of Things.

Table 1: Case descriptions

Startup	Founder	Idea	Product/Service	Target Group	Revenue	User Base
Ada (since 2014)	Natasha Madov	Technology and digital culture news for women	Creation and curation	Users and businesses	Advertising syndication	Several thousands
Go Baller (since 2014)	Chris Dell	Social discovery app for sports fans	Aggregation	Users and businesses	Advertising service-deals	Pre launch
Informrly (since 2013)	Ranjan Roy	Industry news personalized for your inbox	Semi-automated aggregation	Users	Subscriptions	Several thousands
Upstrt (since 2014)	Colin T. Kelly	Free e-mail newsletter on Internet of Things news	Curation and manual aggregation	Users & businesses	Advertising	Several dozens

Implementation

The data for this study was collected through multiple sources. First, the websites, social media channels, and mobile services of the selected media startups were analyzed to gain an understanding of the basic idea as well as the contents and services offered. Second, additional information was examined, such as videos and news articles, to learn more about the startups' development and background. Third, in November and December 2014, semi-structured, in-depth interviews with the startups' founders were conducted. The interview guidelines were developed from the literature on market orientation and news startups, as summarized earlier. They included questions on the original idea for the startup and its development as well as a focus on the roles of users, businesses, and competitors in its processes. The interviews were informal in nature and lasted 30 to 45 minutes each. They were recorded and subsequently transcribed. Fourth, internal documents and information obtained during the interviews or after were studied, such as surveys and additional background facts, which illustrated the interviewees' statements. The different types of data provided different kinds of insights. The website and other services gave an impression of the startups' offerings as well as their positionings. The videos and news articles allowed following the development of the startup over a longer period of time. The interviews provided specific information for the research question regarding market orientation of news startups. Additional documents provided an even deeper insight into their practices and processes. They also allowed to evaluate statements of the interviewees. Therefore, a complementary mixture of contextual and specific data, as well as objective and subjective information was collected.

For the analysis, a deductive approach was employed to support the comparability of the multiple-case study (Johansson, Ellonen, & Jantunen, 2012). The present study also relied on theoretical propositions and cross-case synthesis, as recommended by Yin (2009). The literature review and the interview guidelines served as the framework for coding transcripts and all other material using MAXQDA software (Simons, 2009), while remaining open for additional themes. Subsequently, emerging patterns across cases as well as differences between them were identified. Throughout the analysis, the original material was consulted multiple times to further strengthen the findings.

When designing and conducting the case studies, quality criteria were considered, as discussed in the literature (Yin, 2009). To enhance reliability, the same four steps of data collection were followed, as described above. Additional notes were kept along all material in the case database in MAXQDA. To increase construct validity, multiple sources of evidence were used such as interviews, videos, and secondary data. Internal validity was enhanced through alternative methods of analyzing the data such

as cross-case pattern matching and explanation building. Finally, external validity was supported by examining four cases (replication logic) and building the protocols for data collection and analysis based on a thorough literature review.

4 Results

Overall Market Orientation

The startups investigated in this study thoughtfully chose the market that they wanted to enter. In the course of their market research, the founders evaluated the volume and potential for future growth. Opportunities on the users' as well as the businesses' side were considered: *"Ada will be the bridge between the tech industry and the female consumer market. I think with our content we'll build a community of women who are interested in this theme and that would be highly valuable for advertisers"* (Ada). Go Baller started out with the idea of an app for sports fans which offers their attention to retailers before providing additional services to businesses. Selling advertisements in a special interest space was also the revenue model for the website *Ehip News*, which led to the development of *Informerly*. The idea for *Upstrt* was based on the market potential of the audience and the advertiser side around the Internet of Things and a lack of competition. In the following, user orientation, business orientation, and competitor orientation at *Ada*, *Go Baller*, *Informerly*, and *Upstrt* will be thoroughly examined.

User Orientation

A shared characteristic of the startups in this study is that they placed users and their needs first. After identifying a problem, the focus lied on solving it and providing the best service: *"The entire core of our business is trying to answer what the users want and making their life easier"* (Informerly). Go Baller was very clear about heading in the direction that the users pointed out to them. This holds true for the content as well as the design of the product: *"We want to do as much as we can to make it aligned with exactly what they want and then just stick to our core values in the process"* (Go Baller).

To be able to do so, startups conduct market research. They look at information that is already available, such as industry reports; however, they also start their own investigations. This is done informally as well as in a more organized and planned manner. The founders talked to friends and colleagues about their ideas to obtain feedback as early as possible. Having a good network is extremely important in this stage. *Ada* had a set of questions to collect information about women, their habits, and their interest

in technology news when interviewing *“Everybody who would talk to me, just to have a sense of what that group needed”*. For *Formerly*, direct contact in person and over the phone was important: *“There’s so many tools now that help entrepreneurs try to monitor stuff without talking to the end-user, but just getting out and talking to people was the key in all of that.”* The startup made sure to talk to highly engaged users throughout the process of further developing the product and based its decisions on their findings such as opting for a mobile app instead of a website. The startups also conducted surveys, designed for their specific questions. For instance, *Go Baller* asked sports fans about their preferred sources for sports content on social media. The results helped them to optimize the service and fulfill users’ needs even more. The startups’ findings would also influence decisions and future directions of the business, by either providing support for a chosen route or changing the founders’ perspective. *Formerly* inquired about its users’ preferred mobile operating systems to meet their demand when developing the mobile app. However, getting to know the users’ needs is not the only important for the product:

“One of the mistakes we made early, the worst thing co-founders can do, is sit in their room and try to debate what they want in a product, or what they think is the best product. We would get in these long discussions and debates over ‘This is how I like to use products; this is the design I like’. And then we realized everything should just be based on fifty people said this, or seventy people said this. It makes everything less personal between co-founders, which is important” (Formerly).

In addition to market research, startups try to collect feedback from and engage with their users on an ongoing basis. Prototypes are tested early and demonstrated in front of different audiences: *“We try to incorporate every type of feedback we can get, the more feedback the better” (Go Baller)*. *Ada* uses social media as a tool and it is very curious about its readers’ opinions: *“If someone tells me ‘I love that’, I’m going to grill them, ‘What did you like about it? What didn’t you like about it? What do you think we could improve?’ I use that. It’s not systematically in that sense, I don’t have a methodology for it.”* In the course of these interactions, startups are open to fulfilling their users’ requests, which could result in an article on a specific topic (*Ada*) or in adjusting the personalized settings for the newsletter (*Formerly*). Despite being mostly informal, it helps building relationships with the users: *“Even as a writer, you try to always tell the story the right way and engage, I think engagement is the key word” (Go Baller)*. Having an engaged user base is equivalent to loyalty and trust. The community evolving around the service is crucial for startups.

However, having an engaged and loyal community is not the only measure of success. Startups also have to keep track of quantitative metrics. For *Ada*, unique visitors are important. In addition to the total traffic, the startup looks at how individual articles are doing to focus on popular topics. However,

newsworthiness is also always a criterion. Considering the interests of the audience is important for *Upstrt* as well: *"I don't have a methodology yet. It's kind of informally, looking at results as it goes along and seeing what resonates with people and keeping it in my own head. If it gets to a larger number, I think I'll probably try to apply some actual analytics to it."* *Go Baller* focuses attention on the entire range of metrics. The startup looks at app downloads compared to how many users come back and time spent on the app as well as time spent personalizing the app like choosing a favorite team, players, and events. For *Formerly*, analytics are an integral part of the service since what the users click on influences the personalized newsfeed: *"We think a media company should know every single person, which is completely opposite of how it works right now."* Consequently, they decided against joining the race for unique visitors: *"The value we have is the list of people. Playing the pure traffic game, we realized, is not where the world's going to end up"* (*Formerly*). In addition to helping with meeting users' needs and improving the service, user data is also important for the advertising market.

Business Orientation

The founders thought about the advertising side of a typical media business early in the process of developing their startup. *Upstrt* turned out to be an email newsletter rather than a website since the format delivers actionable statistics: *"Who's clicked on what, what time the e-mail was opened and things like that. I think that's going to be eventually more compelling to advertisements, which is one of the reasons why I went down that road."* However, startups put less effort into market research in this field. They also pointed out having a good understanding of the advertising market because of their experience in other media outlets. *Ada* and *Formerly* exploited contacts in their professional network to collect different opinions. The startups used their findings to make decisions and adjust the direction of the business. For instance, *Formerly* focusing on a subscription model instead of advertising stated: *"It was in those conversations, realizing that's a whole different thing that distracts from what we are trying to do."*

One of the reasons for less market research on the advertising side can be found in the perceived superior importance of the user in the early stages. Startups feel like they need to build a user base first, before thinking about advertising in more detail: *"I haven't attempted to sell ads on the email because I haven't reached the subscriber number I feel like I need to present a case for something that would be interesting"* (*Upstrt*). The same holds true for *Ada*, to which advertisers recommended to grow its audience first.

The second reason for neglecting the advertising market is a focus on alternative revenue streams. *Ada* successfully creates content for other media outlets, which generates income as well as traffic for the

website. *Go Baller* aims to offer sports brands a platform that they can market to their fans. Also in this business-to-business field, market research and listening to potential clients' feedback is crucial: *"I've been talking to different editors from sports media outlets who are interested in that type of product. Once we launch and get ourselves in the hands of clients, we'll probably do a couple pilot runs and then see how it goes and figure out pricing models"* (*Go Baller*). This platform will allow sports brands to collect valuable data about the users to monetize social media. In developing the business further, *Go Baller* partners with clients to learn about their needs and make improvements in fulfilling them.

For *Upstrt* traditional media outlets are too focused on advertising and they fail to explore alternative revenue streams: *"It is not really thought about what the needs of the reader are. Trying to create content that people are going to be willing to advertise on is more important than creating content that people would find useful."* Regarding new ideas in advertising and alternative revenues, the competition is potentially interesting.

Competitor Orientation

The startups investigated in this study have a very broad understanding of competition: *"We have competitors in all different landscapes. Any place where people go to get sports, that's your competition. But we really just have to focus on being the best that we can be and capitalizing on all their weaknesses and learning from that along the way"* (*Go Baller*). For *Ada*, the competition is other tech news, whether it is traditional media's reporting or bloggers writing about personal experiences. In general, knowledge about the market and the competition's strengths and weaknesses is seen as important: *"The more you learn about the market the more you can learn about everything, the more advice you get, the more feedback you get, on everything from business to product, realizing what is Go Baller's place in the market, how do we fit in"* (*Go Baller*).

For *Formerly*, being in New York was crucial and it allowed the startup to study the competition *"obsessively."* Moreover, it benefited from sharing office space with *Reddit* and being able to learn from others' experiences as well as its own. Following the experience with the predecessor *Ehip News*, the startup chose a different path than the highly competitive fight for unique visitors. *Formerly* also monitors industry trends on an ongoing basis: *"I am already sifting through tons of media news anyways. That's how it is easy to keep up-to-date with what's going on."* For *Go Baller* knowing about mobile apps is essential: *"I have every app known to mankind that could be some sort of competitor or ally or partner. I have every news app, every news curation, personalization, aggregation app on my phone. I love reading about and*

testing out new products when it comes to mobile apps.” Ada’s and Upstrt’s research activities on competitors are rather informal and not standardized. More specifically, they monitor news, check RSS feeds, and follow influencers’ social media accounts. However, this is primarily done to have an overview of what the most important topics are at the moment. Staying “up-to-date” with the changes in the market place and the latest trends is a by-product. The lack of competition around the Internet of Things, identified by Upstrt when developing the startup, proved to be more difficult than expected: “What I’m starting to learn is that, if there is not something out there existing in your niche, there might be a reason for that. In a lot of times it is better to go with some competition because it means that somebody’s making money in that realm.”

Facing significant competition in sports news, *Go Baller* moved towards offering services to businesses such as aggregating content for sports brands as well as giving insights and analytics to their clients. It followed a simple thought: *“Why try to compete with them directly when I could partner with all of them, potentially, and give them our social media curation services”* (*Go Baller*). This shows how flexible startups react, not only to the needs of users and businesses but also to competitors in the market.

5 Discussion

The news startups under study show characteristics of market orientation, as identified in the literature: generating, disseminating, and coordinately responding to market intelligence (Kohli & Jaworski, 1990). They think about different markets and their connections from the beginning. They explore the user side, the advertising market, and the competition, which is similar to traditional media outlets’ market orientation model. Moreover, they look at other revenue streams and experiment with different business models in the early stages. In these processes, network effects are extremely important. Consequently, the media startups in this study decided to focus on one market (users) or serve two groups of customers (users and businesses). Their curiosity about these options and their willingness to take the risk to follow unconventional paths shows that market orientation does not necessarily lead to “me-too” products and services, but it can foster innovation (Wren et al., 2000). However, in the process of further developing the business in a two-sided market, startups prioritize certain markets and place different emphasis on users, businesses and competitors.

Most of the attention is dedicated to users, where network effects are most important. Their needs are put first to offer the best product possible. Startups conduct market research both informally and formally, which is similar to traditional media outlets (Sommer & Krebs, 2016). They not only look at industry reports and various statistics but also launch their own investigations. The most popular

approaches include talking to colleagues, business contacts and users in person or on the phone, and conducting surveys. The knowledge acquired about users' needs and preferences is shared across the startup and discussed in the decision-making processes (Narver & Slater, 1990). Particularly important is quantitative data generated by the service itself, for instance, the clicks on links. Startups look at as many metrics as possible to learn about user behavior to improve their products and services. The similarity to traditional media lies in the lack of systematization regarding how to use the data (Usher, 2013). However, while at traditional media outlets reservations to follow the data are common (MacGregor, 2007; Tandoc & Thomas, 2014), the startups are far more open to adjust to their findings and they are less concerned about journalistic values and media's implications for society.

The advertising market is explored less systematically. Startups build on their experience in other media outlets and talk to contacts in their professional network to collect information about advertisers' interests. This enables them to monitor the market and identify opportunities (Wirtz et al., 2011). Despite thinking about what could be valuable to advertisers, startups do not put their needs first. This differs from traditional media outlets. As a consequence, startups also explore alternative revenue streams in more detail (Bruno & Nielsen, 2012; Cook & Sirkkunen, 2013). These include partnerships with traditional media outlets as well as services for other organizations. Startups reach out to professional contacts in their network to learn about the needs of their businesses, and they partner with them in further developing the service. This gives them the opportunity to gain even deeper insights into the market and collect inside knowledge, which would not be accessible otherwise. Similar to the approach on the user side, startups are more than willing to fulfill their clients' demands and tailor the service to their needs.

In terms of competition, the startups under study have a very broad understanding. They monitor industry trends on an ongoing basis and attempt to learn as much as possible about their environment, which is also important for traditional media outlets (Habann, 2010). While studying the competition is a by-product for some, other startups analyze the strengths and weaknesses of competitors to derive decisions for the direction of their business and their positioning in the market (Narver & Slater, 1990; Slater & Narver, 1995). This is achieved by following news, feeds, and social media as well as personal contacts, which is rather informal. In comparison, traditional media outlets tend to have a narrower understanding of competition (Sommer & von Rimscha, 2014).

Overall, *Informerly* and *Go Baller* placed most effort into learning about and adjusting to users, businesses, and competitors, as summarized in Table 2. Consequently, the founders significantly adjusted their original idea. In line with the market orientation model for media startups (see Figure 1),

these two startups were able to raise funding from investors and they are most likely to survive. They also followed unconventional paths and experimented with business models which corresponds with market orientation fostering innovation (Atuahene-Gima, 1996; Ordanini & Maglio, 2009). *Ada* and *Upstrt*, however, placed fewer resources into market orientation. Both startups followed an informal approach and adjusted less to their findings. In doing so, they did not see the expected growth and their survival is uncertain.

Table 2: Case summaries

Startup	Market Orientation			Changes	Survival
	Users	Businesses	Competitors		
Ada (since 2014)	Medium	Medium	Low	None	Stagnation
Go Baller (since 2014)	High	High	High	From app to software as a service	Secured funding and launched app
Informerly (since 2013)	High	Medium	High	From website to newsletter to subscription service	Secured funding and launched subscription service
Upstrt (since 2014)	Low	Low	Low	None	Newsletter on hold

6 Limitations and Further Research

This exploratory study is based on four cases of early stage news startups. It must be kept in mind that they received training through the Tow-Knight Center for Entrepreneurial Journalism. Consequently, generalizability to the media industry as a whole is limited. Especially, larger media outlets in which processes and responsibilities are more differentiated may substantially differ. For instance, they could have more resources for market research, but at the same time, they could be less willing or able to adapt to their findings. Thus, future studies need to examine these potential differences between smaller and larger media outlets, not only from a journalism point of view but also from a media management perspective. It would also be valuable to follow media outlets over an even longer period of time and analyze their market orientation in relation to their success. This approach would allow an investigation of the influence of market orientation in different stages of a startup's maturity as well as on its development and innovativeness. Finally, market orientation needs to be related to other success factors to understand its relative importance.

7 Conclusion

The four case studies show that news startups in their early stages generate market intelligence in various ways and, in doing so, prioritize markets. Their investigation of the user side is most comprehensive. They use qualitative and quantitative methods, such as interviews and surveys, to learn about users' needs and behaviors. In the advertising market, startups follow a less formal approach, mainly relying on their personal experiences and conversations. However, they still explore alternative revenue streams, interview potential clients, and partner with them to meet their needs. Startups also analyze the strengths and weaknesses of their competitors as well as monitor news and exchange experiences with other startups to stay up-to-date with current trends and the competition.

The collected knowledge is distributed across each startup and discussed in the decision-making processes. More specifically, it is used on different levels: specific metrics for minor adjustments such as the design; quantitative and qualitative data for central questions such as which content to focus on; and qualitative information when choosing a direction for the business such as the dependence on advertising. The cases show how open and flexible startups are to adjust to their findings. This is in line with previous research pointing out new firms being particularly attentive to their business environments (McKelvie & Wiklund, 2008). Our results also suggest that startups that are more market-oriented are more likely to survive.

In terms of market orientation theory and media innovation, this study shows that generating market intelligence and responding to the findings does not necessarily lead to "me-too" products. For news startups, the opposite seems to be true; that is, the more they learn about their environment, the better they are at exploring new paths and finding their distinct niche. Therefore, market orientation is important for developing and improving new media products and services.

Regarding market orientation theory in the media industry, the present study shows that news startups do not consider journalistic values and media's impact on society. Howat (2000) noted that old boundaries do not have the same meaning in the online world. What makes media special is the two-sided market. Accordingly, market orientation of news startups is characterized by generating, disseminating, and coordinately responding to market intelligence about users, businesses, and competitors on an ongoing basis. In doing so, it is important to consider network effects and prioritize markets based on the findings to survive and succeed.

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Sommer (2015): Media Brands and the Advertising Market

Exploring the potential of branding in media organizations' b2b relationships. In G. Siegert, K. Förster, S. M. Chan-Olmsted, & M. Ots (Eds.), *Handbook of Media Branding* (pp. 97–110). Berlin: Springer.

Abstract

Because of the changes in the media industry over the last years, brand management has become a key issue. Media brands fulfill important functions to compensate media product characteristics, one of those being the need to address the audience as well as the advertising market. Accordingly, branding strategies have to be developed from the brand identity for both groups of customers while being considerate about the match of the evolving images. This approach offers benefits not only in the audience market, but to media companies and advertisers alike. Through laying emphasis on a brand's exceptional contents, audiences and services, media companies can build up brand equity and differentiate themselves from competitors. Advertisers on the other hand profit from media brand activation and context leading to involvement of a distinct target group with the advertisement. Associations with the media brand are transferred to the commercial message, making it more credible and effective.

1 Introduction

In recent years, brand management has become more important in several industries because of increasing competition and market segmentation. This holds true for the media especially. For years, newspapers, magazines, books, radio, television and movies have been distinct media with equally distinct production and consumption characteristics. Because of digitalization and convergence, media boundaries have disappeared and are no longer valid (Sommer & von Rimscha, 2014). In addition, the homogenous mass audience is becoming divided and subdivided into ever smaller target groups, who can choose from several niche products. While the number of options has skyrocketed and is almost limitless, usage has not kept pace. This is a classic example of the law of diminishing returns: more choice has not translated directly into more consumption. The ultimate consequence is a zero-sum market, where the number of brands within a product category increases, while the number of potential customers remains the same. The only way to attract more customers is to take market share from direct competitors (McDowell, 2004, 2006). These developments made it inevitable to put effort into branding strategies as brands can serve as heuristics simplifying decision-making. In doing so, media organizations focus on the audience, working on their differentiation to other products and services, while the advertising side is discussed less frequently.

A similar phenomenon can be observed in brand management research. Studies primarily investigate branding strategies in the audience market. As an exception, Ots and Wolff (2008) connect this stream of research to the advertising market. They look at consumer-based brand equity's implications for media planning and show that it has an influence on decision-making. However, a lot of questions remain unanswered. Therefore, I explore the uniqueness of branding in the media in more detail and investigate the potential of branding in the advertising market as well as potential benefits of media brands for advertisers.

Accordingly, this article looks at branding in the media, pointing out differences to other industries (Sect. 2). In the following, functions of media brands are explored (Sect. 3). Addressing the research gap in the advertising market, the focus lies on media brands' potential in the relationship between media organization and advertisers (Sects. 4 and 5). I suggest an integrated media branding model, considering audience and advertisers in media organizations' strategies. Last but not least, an agenda for future research is proposed (6).

2 Branding in the media

In brand management, *brand identity* is a well-established concept (Aaker, 1991; Esch, 2005, 2012; Meffert et al., 2008). Based on Aaker (2010, p. 68) it can be described as a “unique set of brand associations that the brand strategist aspires to create or maintain. These associations represent what the brand stands for and imply a promise to customers from the organization”. Furthermore, with the help of the brand identity a relationship between the brand and the customer should be established by generating a value proposition involving functional, emotional or self-expressive benefits (Aaker, 2010).

Thus, the concept of brand identity is integrating an internal (self image of the brand) and an external (public image of the brand) perspective and their interactions. The brand is positioned through the brand identity and perceived by the customer through the brand image. *The fit of brand identity and brand image is crucial as it determines the credibility of the positioning of the brand* (Burmman & Meffert, 2005).

McDowell (2006, p. 234) defines a brand in the context of media as “a name, term, sign, design, or unifying combination of them intended to identify and distinguish a product or service from its competitors. Brand names communicate thoughts and feelings that are designed to enhance the value of a product beyond its product category and functional value.” According to Siegert (2008), media brand management is defining and communicating what a brand stands for. These definitions are not at all different to those used in other industries. However, when applying the brand identity approach to the media, *media product characteristics* have to be considered.

Firstly, traditional media organizations serve two groups of customers, which is described as a *two-sided market* in scientific literature (e.g. Dewenter & Haucap, 2009; Wildman, 2006). While they offer content to the audience, they create opportunities to promote products and services. Hence, in addition to the audiences’ brand image, advertisers have a brand image too. As seen in *Figure 1*, media companies define their brand identity, from which strategies for the audience as well as the advertising market are derived. Subsequently, the brand is perceived by both groups of customers and a brand image develops among audiences and advertisers. *In addition to a fit of brand identity and brand image, there should be a match between audiences’ and advertisers’ brand images*. Both images as well as their match serve as a feedback to the brand strategy as well as the brand identity. Despite audience and advertisers having different interests, they are very likely to come across advertisements targeted at the other group of customers, where contradictory information would be harmful. In the event that a media outlet targets mostly young audiences, but focuses on its wealthier readers, viewers and users when promoting its advertising services, it might lead to the confusion of business customers and less

credible positioning. The example of Austrian newspaper *täglich Alles* shows that a bad image amongst advertisers can lead to failure despite success in the reader market (Fidler, 2008). In certain media businesses more than two groups of customers are important. For instance, cable networks compete not only for the audience's attention and advertiser revenue, but also for carriage on cable systems as well as subscriber fees paid by the system operators (McDowell, 2004). Media not funded by advertising on the other hand, such as movies or books, also have to take the interests of other stakeholders into consideration, such as culture or location promotion (e.g. Castendyk, 2008; Knorr & Schulz, 2009).

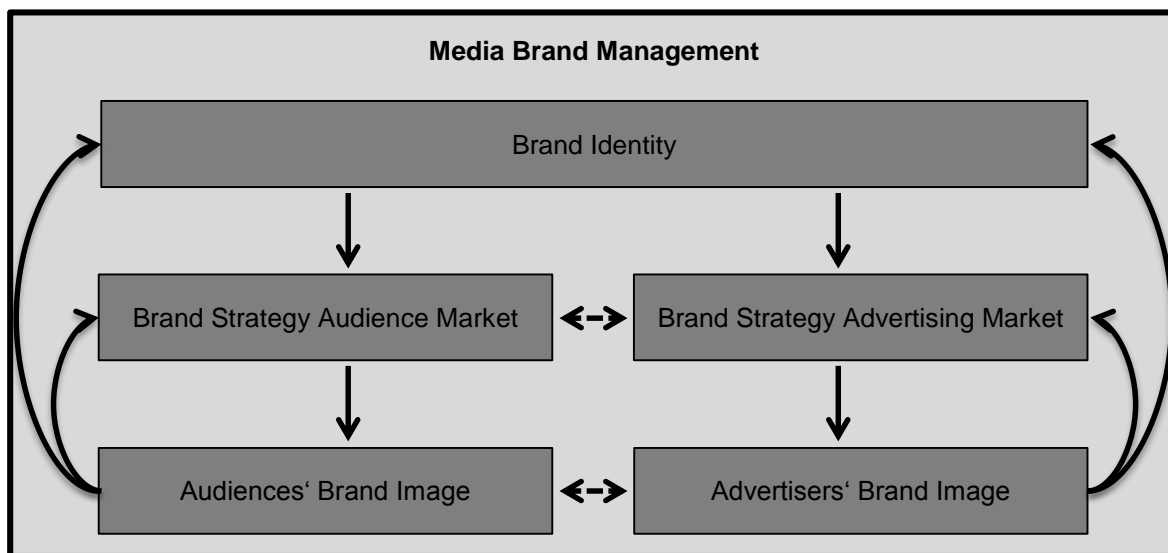


Figure 1: Media Brand Management

Secondly, content and promotion opportunities are immaterial. In addition, media production involves high first-copy costs, creating a one-of-a-kind product in terms of content and design, while up-to-dateness vanishes because of the lack of exclusivity and imitability as they are public goods. From a normative perspective content is important, as media products are not only economic goods but also cultural and merit goods, fulfilling certain functions for society. Hence, branding a media product is different to branding in the consumer goods sector or other industries (Chan-Olmsted, 2006c; Craig, 2013; Doyle, 2013; Kiefer, 2005).

Thirdly, media consumption involves high insecurity about the quality of the content as it can be evaluated after consumption or not at all. This makes products experience and credence goods (Heinrich, 2010a; Kiefer, 2005; Siegert, 2001). On the other hand, media products are not particularly

price sensitive which seldom makes a bad purchase significant, despite the high risk. Therefore, media consumption has been considered a low involvement experience, where there is little motivation to invest in decision making, and competing products are easily accessible (McDowell, 2006). Against this backdrop, branding becomes even more important. While content and design are ever changing, the brand is the only constant. High quality in terms of fulfilling user's needs is not sufficient for success. It has to be signalled through additional information and conveyed effectively before reception.

Lastly, the consumption of media products leads to external effects, such as the issue of climate change and everyone's responsibility in that context being on the agenda, leading to recipients buying something because of an article or consuming something because it was portrayed in the media as environmentally friendly (Kiefer, 2005). Furthermore, media consumption creates network effects. The more people watch a programme, the more important it gets, e.g. you have to watch a certain series to be able to join the conversation about it. Media brands can try to benefit from these effects through being part of the discussion.

In addition to these characteristics that in their unique combination differentiate the media from any other industry, media organizations have the option of self-promotion (McDowell, 2006; Siegert, 2001). Through their content they can contribute to their branding, try to influence brand images in the audience and advertiser markets, as well as set the agenda in a meta-discussion about the brand.

Because of the two-sided market, immateriality, insecurity, external effects and self-referentiality, marketing in the media is very challenging. However, brands fulfil several functions, which help to overcome these obstacles.

3 Functions of media brands

In the literature, *media brands' functions* are differentiated from the organizations', the audiences' and the advertisers' perspective (Siegert, 2001; see *Table 1*). In the following, they will be described in more detail.

For advertisers, media brands provide a known and reliable marketing concept and the attention of a well-defined target group. This in turn might reduce the need of own marketing tools. Hence, adverts can benefit from the fit of the product brand and a media brand as well as reach their target group more effectively. Media brands even offer the opportunity of equal partnerships between the advertiser and the media brand.

Functions of media brands

For audiences, media brands provide orientation when buying, consuming and interpreting media. They can assure quality and reduce risk in the selection process. E.g. when buying *The New York Times*, one expects a certain journalistic standard, a certain range of topics as well as a certain framing. Hence, when reading political news, the political orientation of the paper can be taken into account. On top of that, media brands provide additional individual and social benefits. As an example, someone might be able to influence his or her image through reading *The Economist* in public (see also Ots & Hartmann as well as Scherer in this handbook).

Table 1: Functions of Media Brands (Siegert, 2001)

Organizations' perspective	<ul style="list-style-type: none"> -Facilitating decisions in the selection process -Facilitating decisions in buying and production -Facilitating recruiting and cooperation -Securing innovation -Building a corporate identity -Attributing ad effects to products -Structuring program planning and audience/media research -Boosting and stabilizing sales -Differentiating from competition -Strengthening the position in negotiations with advertisers
Audiences' perspective	<ul style="list-style-type: none"> -Facilitating decisions in the selection process -Giving orientation while using media -Providing a frame for interpretation -Securing quality (e.g. credibility) -Reducing the risk of a mistake -Providing additional individual and social benefit
Advertisers' perspective	<ul style="list-style-type: none"> -Providing a known and reliable marketing concept -Providing target group specific attention -Reducing the need of own marketing tools -Giving opportunities for equal partnerships

For the media organization, brands facilitate choices in the selection process or when setting up selection guidelines. They can also be a point of reference for decisions in production and buying (see also Siegert in this handbook). Another function is the media brand's role in recruiting, where it can serve as a signal for human resources management. Furthermore, it is important for deciding on cooperation. For instance, a newspaper defining high quality as the core of its brand identity should therefore pay attention to the accuracy of its content and invest in exclusive information as well as its employees. The media brand also offers the potential of securing innovation within the organization and building a corporate identity. It allows attributing effects to certain organizations or products. A TV station could stand for very young and innovative programming, transferring these values to products in its environment. From the organization's perspective, the stabilization of sales through media brands is important. It can also be a basis for structuring program planning and audience

research. In addition, media brands allow differentiation from the competition and potentially strengthen the position in the advertising market. An online outlet might be able to benefit from its offline reputation and therefore have a strategic advantage over its competitors.

However, *certain functions of media brands for media organizations and audiences are of importance to advertisers as well.* In particular, a media organization's corporate identity and differentiation from competitors are potential benefits. Advertisers also profit from stable sales figures, as it reduces the risk of buying advertising space and time. The benefits of media brands' functions from the audiences' perspective are a frame for interpretation, and especially a proxy for a certain quality.

To sum up, the media brands' communication and signalling opportunities are important for the media organization, audiences and advertisers. In addition, they can compensate immateriality and insecurity within the media selection, consumption and interpretation process, as well as assure an expected quality. Media brands can also support external and network effects through a fit and transfer of associations between brand, content and advert.

As media brands can help to compensate for media product characteristics which complicate marketing, brand management is seen as an important factor in the media industry (Baumgarth, 2009b; Köhler, Majer, & Wiezorek, 2001; Walter, 2007; for an overview of success factors in the media see Sommer & von Rimscha, 2013). Its key role is pointed out in the media, brands, actors and communication model (MBAC model), which suggests a brand identity-driven decision making by journalists and media managers (Siegert et al., 2011). Thus, the media brand is a key asset of media companies (Wirtz, 2011).

A number of studies investigated different aspects of media brand management such as its relation to success (Baumgarth, 2009b; Caspar, 2002; Chang & Chan-Olmsted, 2010; Collins, 2006; Förster, 2011; Habann, Nienstedt, & Reinelt, 2008b; Rademacher & Siegert, 2007; Schnell, 2008). However, *research shares a focus on the reader or viewer side, while lacking a discussion of the advertising market.*

When focusing on the relationship of the media brand and the advertising market, two perspectives can be distinguished. On the one hand, the media brand can serve as a marketing tool for the media organization in its business with the advertising industry. On the other hand, advertisers can benefit from strong media brands. In the following, these perspectives will be investigated in more detail.

4 Media brands as a marketing tool in the advertising market

Baumgarth (2004b) assumes that strong media brands are more likely to be in the consideration set of decision makers and that their evaluation will show better results than what you would expect from nothing but quantitative figures. In addition, Ots and Wolff (2008) state that brand equity influences media buyers' selection process. However, this argument focuses on the customer based brand equity with the customer being the audience. But media organizations need to build brand equity in the advertising market as well. It is crucial to communicate information about the company, its media outlets and their contents to potential audiences as well as the business community (Baumgarth, 2004b; McDowell, 2004). "Consequently, media brands must generate two sets of brand strategies" (McDowell, 2006, p. 245).

As shown above, brands help to simplify life. Consumers often lack motivation, capacity or opportunity, to process all of the information which they are exposed to. Hence, they opt for quick resolution techniques stored in memory. In addition, strong brands also reduce risk and uncertainty. The behavioral outcome of relying on brands is therefore a cultivation of habits: Loyalty (McDowell, 2006). This holds true for consumers as much as for advertisers.

However, *business-to-business (b2b) advertising* has different objectives compared to advertising for consumers (b2c). While consumer ads are typically aimed at the general public segmented into narrower demographics or lifestyle groups, b2b advertising focuses on business decision makers, such as marketing managers or media planners. In doing so, it has to be considered that members of a business community share a common understanding of what is read, viewed or heard (McDowell, 2004). This makes differentiation easier and more difficult at the same time.

Ots and Wolff (2008) recommend media companies to influence the perception of media buyers in four aspects: Firstly, media companies should focus on the superiority of their audience profile based on either quantitative measures or segmentation. Secondly, commitment of consumers and brand loyalty are important aspects. Thirdly, media marketing should work on the match of media brand image and advertised product brand image. Lastly, media companies have to concentrate on the responsiveness of branded editorial content to certain consumption needs. They conclude that media brands "with a clear audience segmentation profile, the ability to show strong emotional and behavioural attachment of the consumers to the consumer brand, and a clear response to consumption patterns and needs are perceived to have high brand equity, according to our respondents. If these brand positions are

communicated consistently to the advertising market, they seem to have good opportunities to build brand equity on the b2b markets" (Ots & Wolff, 2008, p. 108).

A study of cable network's b2b advertising reveals seven differentiation strategies (McDowell, 2004):

- Affluence: Differentiation from "poorer" competitors through statistical information on income and buying power of the audience ("upscale", "professional", "sophisticated")
- Targeted sex or age demographics: Concentration on narrow attractive demographics ("The first network for men", "Dedicated to young American Hispanics) or even ratings growth potential ("fastest growing", "ratings on the rise", "building on the momentum") based on statistical data
- Targeted personality or lifestyle: Combination of statistical information with intangibles of an audience ("Our viewers are a different breed ... Savvy. Curious. Active", "Passionate in their Pursuits")
- Unique audience behaviour: Appreciation of practical needs of advertisers through information on audience behaviour and attitudinal research such as length of tune-in, internet usage, loyalty or satisfaction ("Attracts early adopters – first on the block", "... among the highest in commercial recall")
- Best off-network hits: Focus on previously successful programs ("Prime Time in the daytime")
- Original or first-run programming: Emphasis on original programming not available elsewhere ("... a great passion and investment behind our vision", "Critically acclaimed")
- Reputation: Focus on intangibles rather than quantitative ratings data ("risk taking", "bold", "cutting-edge", "most-trusted")

While quantitative and qualitative criteria play a role in these strategies, the media brand can be a signal for both. In addition to an emphasis on content (topics, quality) or audience (figures, demographics), a media brand can stand for exceptional customer service in the advertising market which is highly valued as well as a means of differentiation (Ots & Wolff, 2008). In doing so, media companies can reduce advertisers' information overload and support their decision process in order to build up brand equity in the advertising market. High brand equity means strong favourable associations towards a brand, which leads to behavioral loyalty, in this example a repeated buy.

5 Advertisers' benefits from strong media brands

Media brands have certain effects on advertising messages, which provide potential benefits to advertisers (Baumgarth, 2004b). Two key concepts are activation and context, which are highly relevant to the level of involvement in reception and perception processes (Marty, 2013).

Watching TV or listening to the radio are common examples of low activation and hence lead to passive media consumption and low involvement. High involvement on the other hand, is characterized through an active consumer, who looks for information intentionally, such as reading a newspaper or a magazine (Berkler, 2008). In the literature, high involvement is attested a positive influence on advertising success and recall. Attention for media content is transferred to placed adverts (Moorman, Willemsen, Neijens, & Smit, 2012).

Context is the environment in which the advertisement is embedded. In television, a positive effect of the programming on advertising success was shown because of a spillover from consumers' interest in the media context on the embedded advert (Moorman et al., 2012; Tsiotsou, 2013). For print media these context effects are even stronger than in TV, as readers can decide how much attention they want to devote to an advert. Involvement with the publication leads to the positive assessment of advertisements and the advertised product as well as a connected buying decision (Tipps, Berger, & Weinberg, 2006). Hyun, Gentry, Park and Jun (2006) show a positive relation of context and advertising recall for magazines. In radio, the involvement of listeners had a positive connection to the opinion on the advertised brand and the buying intention, as they are more responsive to adverts when listening to a program which they like and are involved in (Norris & Colman, 1996).

It is shown that a positive experience with a medium leads to more ad efficiency (Malthouse, Calder, & Tamhane, 2007). According to Unger, Durante, Gabrys, Koch and Wailersbacher (2002) the placement of an ad next to a related article affects the effect of the advert. More generally, the fit of media content and ad message also has a positive effect (Norris & Colman, 1996). This is emphasized by Esch, Krieger and Strödter (2009), who point out that the environment influences a positive or negative attitude towards advertisements and brands.

Involvement and fit can both be provided by the media brand in the relationship between advertisers and media company. In addition, the media brand's image is important. Positive associations such as credibility or high quality are transferred to the advertised product or service (Gierl & Hüttel, 2009). Ots and Wolff (2008) are more specific and point out that the audience's relationship to the personality of the medium can rub off on commercial messages and make the communication more effective.

Another advantage of a strong media brand is its consumer based brand equity. Three different brand effects leading to potential benefits for advertisers can be distinguished (Ots & Wolff, 2008, p. 105-106; see *Figure 2*):

- Behavioral loyalty of consumers to the media brand increases predictability and stability making purchase of ad space less risky
- Attitudinal loyalty of consumers of the media brand improves advertising impact and efficiency
- Differentiation of well-defined target groups of the media brand allows more advanced media planning routines and higher target group affinity

Siebert's (2001) functions of media brands from the perspective of the media company and audiences are closely related to those brand effects.

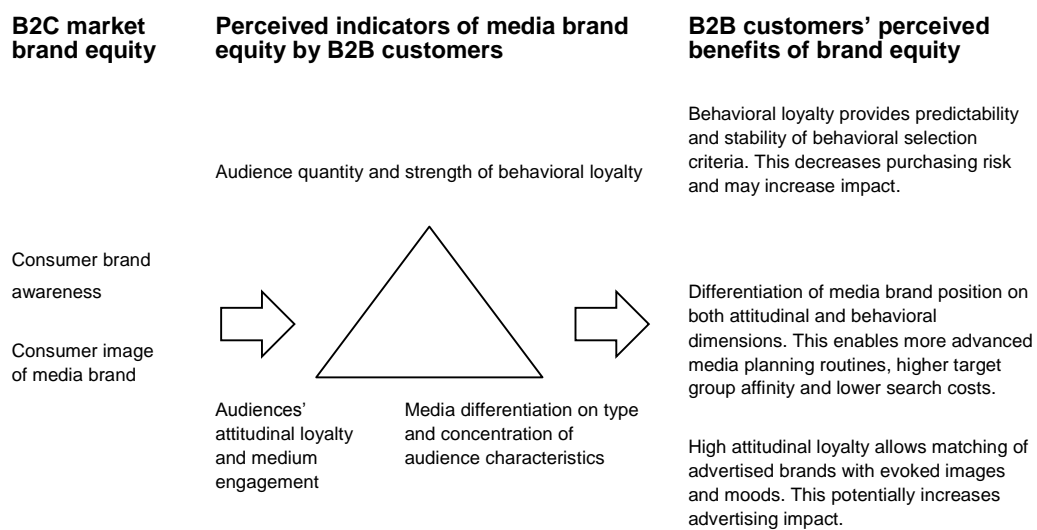


Figure 2: Consumer Based Brand Equity in Media's B2B Relationships (Ots & Wolff 2008, p. 107)

Baumgarth (2004b) summarizes the benefits of strong media brands for advertisers. They stand for a high subscriber ratio, a high reading quantity and a positive reading environment leading to more effective advertising. Another effect results from addressing a distinct target group. These potential benefits of strong media brands lead to higher brand equity and make media planners accept premium prices.

Despite the potential benefits just discussed, as well as the willingness to pay a premium, the media brand as such does not seem to be an important criterion in the advertising market. Within a study in

Switzerland, we investigated the role of the media brand in *media planning* (for details see Marty, 2013). In total, 47 advertising and media planning professionals answered our questionnaire about media selection criteria and the importance of the media brand for different elements in the process. When comparing qualitative with quantitative criteria, they are rated as less important: while 21 percent said the relation of qualitative versus quantitative would be 70:30, 40 percent chose 30:70. Amongst qualitative criteria which we selected from the literature, the media brand ranks seventh (out of 10 items), after media mix fit ($M = 4.38$), image ($M = 4.34$), involvement ($M = 4.15$), editorial environment ($M = 4.13$), target group profile ($M = 4.04$) and role of the medium ($M = 3.89$) with an average of 3.64 on a five point Likert scale. However, all qualitative criteria are related to the media brand. It is the connecting element when content is offered on multiple channels and therefore closely related to the media mix. The image is an integral part of the media brand concept. Involvement, editorial environment, target group profile and role of the medium are also aspects the media brand can stand for, as shown above. Therefore, *we see a lack of in-depth knowledge in the field of brand management amongst media professionals* (McDowell & Batten, 2005). Difficulties in differentiating qualitative criteria and the media brand are also a conceptual and methodological challenge, as media planners clearly acknowledge the values brand attributes represent (Ots & Wolff, 2008).

6 Conclusion and implications for further research

Digitalization and convergence lead to increasing competition in the media industry, which made it inevitable for media companies to put efforts into branding strategies. Media brands fulfill important functions to compensate media product characteristics. Despite the two-sided market being one of those characteristics, a strong focus on the audience can be observed, particularly in media management research.

However, in media's b2b relationships, branding offers benefits to media companies and advertisers alike. Through laying emphasis on a brand's exceptional contents, audiences and services, media companies can build up brand equity and differentiate themselves from competitors. Advertisers on the other hand profit from media brand activation and context leading to the involvement of a distinct target group with the advertisement. Associations with the media brand are transferred to the commercial message, making it more credible and effective.

Despite the potential of branding, media companies are not able to fully use their brands as marketing tools in the advertising market to put themselves ahead of the competition. This might be also because

of a lack of in-depth knowledge of media brands amongst media professionals. Ots and Wolff (2008: 108) conclude that media firms “need to support their case with more convincing evidence in order to take full advantage of these largely unexplored resources”. Therefore, they have to work on their branding strategies laying emphasis on information relevant to media planners, which could be quantitative as well as qualitative. They need to communicate what they stand for (e.g. target group, content, quality), considering the fit between the brand identity and the brand images of both groups of customers. While Siegert, Gerth and Rademacher (2011) put brand identity in the center of decision making by journalists and media managers regarding content for the audience side, this paper suggests an integral approach. *Brand identity should be central to the whole organization and a point of reference for developing business models and business activities. Only then, potential conflicts between audiences and advertisers can be avoided and coherent brand strategies lead to matching brand images in both markets as well as a credible positioning.*

Future research needs to explore this holistic approach to brand management in the media. Focusing on the advertising market, there is a lack of studies on the importance of the media brand in media planning. Following Ots and Wolff's (2008) exploratory qualitative interviews, a quantitative survey is necessary. Once a better understanding of media brands in the advertising market is achieved, research should also look into b2b brand equity and brand management's contribution to success in the media industry.

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Sommer & Marty (2015): The Role of Media Brands in Media Planning

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Abstract

Brand management is well established in the media industry. However, little research exists on the role of a media company's brand in the media planning process. Exploring the brand's relevance from a theoretical perspective, we argue that it is linked to other qualitative criteria. The results of our exploratory study show that for media planners in Austria and Switzerland, the media brand is most important when advertising for specialty goods, in the premium market segment and in magazines and newspapers. We conclude by presenting implications for media companies' brand management to fully exploit their brands' potential.

1 Introduction

For decades, books, newspapers, magazines, movies, radio and television have been considered distinct media with different production and consumption characteristics. Because of digitalization and convergence, these media boundaries have disappeared (Albarran, 2010; McDowell, 2006; Sommer & von Rimscha, 2014). Furthermore, what was known as the mass audience has become divided and subdivided into ever-smaller target groups, who can choose from multiple products within a certain niche. The number of options available has skyrocketed; however, usage has not kept pace. Consequently, the only way to attract more customers is to capture market share from direct competitors (McDowell, 2004, 2006). These developments forced media companies to create brands, which are 'a name, term, sign, design, or unifying combination of them intended to identify and distinguish a product or service from its competitors' (McDowell, 2006, p. 234). Media brands and branding strategies are designed to communicate thoughts and feelings to enhance the value of a product beyond its product category and functional value (McDowell, 2006). In consequence, the media brand creates a unique environment, independent of its means of distribution.

Brand management in the media is somewhat different from that in other industries. Most importantly, it needs to address two markets: audience and advertising (Baumgarth, 2004b; McDowell, 2006; Sommer, 2015). Media research tends to focus on the audience side of media brands and neglects the importance of branding in advertising and media planning. Ots and Wolff (2008) state that media brands influence the media buyers' selection process, whereas a recent study by Knuth, Kouki, and Strube (2013) points out the value of qualitative selection criteria in general. However, details about the media brand, which is considered along with other qualitative criteria in media planning, remain unknown. This information is particularly important to media companies who need to manage the media selling process (Knuth et al., 2013) and understand the drivers of advertising revenues (Wirtz et al., 2011).

This exploratory study investigates the role of the media brand in media planning, examining its importance compared with quantitative and other qualitative criteria as well as within the media planning process. With a better understanding of the media brand, we aim to derive the implications for media companies' brand management. We provide a literature overview on brand management for media companies (section 2.1) media planning and qualitative selection criteria (section 2.2) as well as the potential benefits of media brands for advertisements (section 2.3) from which we develop our research questions. After describing the empirical study, results are presented and discussed. We

conclude with recommendations for further research and practical implications for media companies' brand management.

2 Literature review

2.1 Brand management for media companies

In brand management, brand identity is a well-established concept (Aaker, 1991; Esch, 2012; Meffert et al., 2008), which Aaker (2010, p. 68) describes as a 'unique set of brand associations that the brand strategist aspires to create or maintain. These associations represent what the brand stands for and imply promises to the customers from the organization.' Through the brand identity, a relationship between the brand and the customer is established, providing functional, emotional and self-expressive benefits (Aaker, 2010).

Accordingly, the concept of brand identity integrates an internal and external perspective as well as their interactions. While the internal perspective describes the brand's self-perception, the external perspective refers to its public perception. The brand is positioned by strategists through the brand identity, which is perceived by the customer as brand image. The fit of identity and image is crucial as it determines the credibility of the brand's positioning (Burmman & Meffert, 2005).

The media industry has several characteristics that make its branding different from other industries (Chan-Olmsted, 2006c; Doyle, 2013; Sommer, 2015). Of the characteristics, the most important is that the media serves audience and advertisers at the same time, which is commonly described as a two-sided market. Hence, strategies for both markets are needed. In addition, a fit of brand identity and brand image on the audience as well as on the advertising side is desirable (Sommer, 2015). While there is a fair amount of research on the audience, little is known about media brands in the advertising market and, in particular, media planning (Baumgarth, 2004b; Berkler, 2008; McDowell, 2006; Ots & Wolff, 2008).

2.2 Media planning and qualitative selection criteria

Media planning is a sub-field of advertising (Pasadeos, Barban, Yi, & Kim, 1997). It comprises a series of decisions regarding the best means of delivering advertisements to prospective purchasers of a brand (Sissors & Baron, 2010). Hence, it is the job of a media planner to use media to convey the advertising message to the target customer in the best possible way (Katz, 2010). Accordingly, media planners

define target audiences, decide regarding the appropriate type of media such as newspaper, television or online as well as stipulate dates and times for the advertisements (Danaher, 2007).

The media planning process typically starts with briefing the agency and assessing the communications environment. From the beginning, the good's characteristics and the market segment are defined. Next, the target audience is described and media objectives and media strategy are set. This then leads to the selection of a media mix through intermedia and intramedia comparison. Finally, the budget is distributed, terms are defined and media is bought (Kliment, 2005; Pelsmacker, Geuens, & van den Bergh, Joeri, 2010; WEMF, 2010).

For decisions in media planning, quantitative and qualitative criteria are considered. While quantitative criteria such as reach or frequency have dominated media planning for many years, qualitative criteria are becoming more important (Pelsmacker et al., 2010). Research on the latter is on the rise as well (Cheong & Kim, 2012; Pasadeos et al., 1997). Gensch (1970, p. 176) pointed out early that 'selection of the most effective television shows, radio programs, magazines, newspapers, and other media vehicles to convey a message to a target population has always been more involved than simply selecting the set of media vehicles with the lowest cost-per-thousand.' That this still holds true today, is confirmed through media planning practice (Ipsos, 2008) as well as more recent research (King & Reid, 1997; Knuth et al., 2013). Amongst the most frequently discussed criteria are context and involvement.

A lot of research has been done on the hypothesis that media affect the way advertising is perceived. Some studies focus on the actual environment and show that placement of advertisements next to a related article influences its effect (Unger et al., 2002). In general, the fit of media content and promotional message has a positive impact (Norris & Colman, 1996). Other research looks at the unique editorial environment as a whole, likewise showing differences in perception (e.g. Appel, 2000; Lynch & Stipp, 1999; Norris & Colman, 1993, 1996; Philport, 1993). According to Hyun et al. (2006), magazine context and advertising recall are positively related. Esch et al. (2009) emphasize that the content environment influences a positive or negative attitude towards advertisements and brands. Research also shows that a positive experience with a medium leads to better advertising efficiency (Malthouse et al., 2007). As a result, the editorial environment has a positive influence on the willingness to place an advert (Knuth et al., 2013).

The editorial environment is linked to the audience's involvement with the media product. Watching television and listening to the radio are common examples of passive media consumption with low activation and involvement. High involvement in turn is characterized by an active audience looking

for content intentionally, for example when reading a newspaper or a magazine (Berkler, 2008). In the literature, high involvement is associated with advertising success and recall (Moorman et al., 2012). Studies also show a positive influence of programming on television advertising because of spillover effects from consumers' interests in the media content to the advert (Moorman et al., 2012; Tsiotsou, 2013). In print media, these effects are considered even stronger. Involvement with the publication leads to a positive assessment of advertisements, advertised products and buying decisions (Tipps et al., 2006). With radio, listeners are more responsive to advertisements when consuming a program they like and are involved in. Involvement with the programme influences opinions regarding the advertised brand as well as buying intentions (Norris & Colman, 1996).

Despite the media brand being considered along with other qualitative criteria in media planning (Ots & Wolff, 2008), very little research has been conducted in this specific field. Numerous studies focus on the reader, viewer or user side (e.g., Althans & Brüne, 2005; Baumgarth, 2008; Chang & Chan-Olmsted, 2010; Chan-Olmsted, 2006a, 2011; Chan-Olmsted & Cha, 2007; McDowell, 2006, 2011; Siegert, 2001; for an overview on brand management research in the media industry, see Malmelin & Moisander, 2014), while ignoring the media brands' influence on media planners' decisions. However, the media brand provides potential benefits for advertisements and is related to other qualitative criteria.

2.3 Potential benefits of media brands for advertisements

From the advertisers' perspective, media brands have certain functions (Siegert, 2001). They provide a known and reliable marketing concept and enable advertisers to reach a well-defined target group. These benefits help in saving marketing resources. It is even possible to enter into equal partnerships with media brands. Despite Siegert (2001) distinguishing advertisers from audiences and the media company, functions from the latter two are also important. For instance, a media organization's corporate identity and its differentiation from the competition provide benefits to advertising as much as stable sales figures are an advantage. On the audience side, a media brand provides a frame for interpretation of content and signals a certain quality, which is valuable to advertisers.

As shown earlier, the audience's involvement is important to advertisers. Certain demographic and psychographic aspects increase media planners' willingness to buy advertising space (Coffey & Wurst, 2012; Katz, 2010; Knuth et al., 2013). Media brands not only stand for the audience; they are able to reach them and are more likely to increase their involvement through activation and context, but can serve as a signal for the editorial environment (Baumgarth, 2004b). Positive associations such as

credibility or quality are transferred from the media brand to the advertised product or service (Gierl & Hüttel, 2009). Ots and Wolff (2008) point out that the relationship of the audience with the media brand personality can rub off on commercial messages and make communication more effective. If you combine the media brand image with media brand awareness, the resulting brand equity is another advantage. In the literature, three effects leading to potential benefits for advertisers are identified (Ots & Wolff, 2008):

- Behavioural loyalty of consumers to the media brand increases predictability and stability, making purchase of advertising space less risky
- Attitudinal loyalty of consumers of the media brand improves advertising impact and efficiency
- Differentiation of well-defined target groups of the media brand allows more advanced media planning routines and higher target group affinity

These brand effects are closely related to the functions of media brands from the company's and the audience's perspectives as proposed by Siegert (2001).

However, the media brand is potentially not equally important for all steps and decisions in the media planning process. Because of various branding opportunities and differences in involvement between types of media, the media brand might play different roles. Research also shows that the content of an advert is influential (Rosengren & Dahlgren, 2013) and premium advertisements are perceived as more prestigious (Hempel, Heinrich, & Campbell, 2012), which might lead to differences depending on types of goods and market segments as advertisers try to reach certain audiences and aim for a match with the media brand (Ots & Wolff, 2008; Sommer, 2015). For media strategies, such differences could occur because of their quantitative or qualitative emphasis, for instance focusing on a few selected outlets (Katz, 2010).

3 Research questions

Following the importance of the media brand for advertising from a theoretical perspective, we address the research gap in scientific literature through investigating its role in media planning. First, we are interested in the relation of qualitative to quantitative selection criteria in media planning to understand the bigger picture: *How important are qualitative compared to quantitative selection criteria?* (RQ 1)

Second, we investigate the importance of the media brand compared to other qualitative criteria: *How important is the media brand in media planning compared to other qualitative criteria? (RQ 2)*

Third, we are interested in the role of the media brand within the media planning process. Therefore, we ask: *How important is the media brand for the different steps in the media planning process? (RQ 3)*

Research questions four and five focus on the advertised goods and their market segment: *How important is the media brand for different types of goods? (RQ 4)* and *How important is the media brand for different market segments? (RQ 5)*

Furthermore, we examine the media brand in respect of the media planning strategy: *How important is the media brand for different media planning strategies? (RQ 6)*

Finally, we investigate the role of the media brand with regards to media channels: *How important is the media brand for different media channels? (RQ 7)*

In the following section, we will describe in further detail how we approach these research questions in our empirical study.

4 Method

In our exploratory study, we focus on media planners. This group of professionals was chosen because of its central position and gatekeeping function with regards to the selection and buying of advertising space and time (Bulearca & Bulearca, 2009; Knuth, 2012; Knuth et al., 2013; Sánchez-Tabernero, 2006).

The study was conducted in Austria (8 October – 31 October 2013) and Switzerland (27 February – 22 March 2013) to increase the number of media planners in the sample. Both countries are characterized by a high newspaper circulation, strong public service broadcasters and professionalization in the media. In addition, both countries follow similar advertising restrictions, for instance concerning the separation of content and advertisements as well as product placements. Therefore, Austria's and Switzerland's media systems and market conditions are similar (Siegert, Thomas, & Mellmann, 2009).

In both countries, we were able to collaborate with partners providing access to media planners. In Switzerland, the media research organization WEMF had just surveyed media planners (WEMF, 2012) and made their email addresses available, which we updated. In Austria, we worked with *Forum Media Planung*, an industry association which provides several services for professionals interested in media planning. In total, we were able to collect more than 675 e-mail addresses in Austria and Switzerland and obtained 154 responses. The response rate of 22.81% is comparable to other studies involving media

professionals in German-speaking countries (Habann, 2010; Illenberger, 2013). Non-response tends to be due to busy schedules and frequent requests to answer online questionnaires. For our analysis, we focused on those 99 respondents working in media planning (58 Austrian, 41 Swiss).³ They were on average 36.95 years old, female by majority (60.60%) and had more than six years of experience in their job (74.80%).⁴ Most respondents were responsible for a budget of more than two Million CHF/EUR (67.70%).⁵

Based on our research questions, we developed a standardized online questionnaire in German for both countries, which we discussed with an expert in the field: a Swiss media planner with more than three years of experience. He provided feedback on comprehensibility, validity and completeness of our items, which we included in the final version. His insights were particularly helpful in deciding which items needed further explanation. The method was chosen following recommendations in the literature. Building on an explorative paper (Ots & Wolff, 2008), a study with a larger sample was needed. When comparing quantitative to qualitative criteria (*RQ 1*), respondents had to select a relation of 90:10, 70:30 50:50, 30:70 or 10:90.⁶ For our second research question (*RQ 2*) we compiled qualitative criteria frequently discussed in the literature and used in other studies (Ots & Wolff, 2008; Pelsmacker et al., 2010; WEMF, 2012): amount of information that can be conveyed, editorial environment, function (e.g. information versus entertainment), gut instinct/intuition, image/credibility, impact (e.g. involvement), media brand, media mix fit, personal experience and well-defined target group. Regarding the importance of the media brand in the media planning process (*RQ 3*), we derived five steps from the literature: briefing, intermedia comparison, intramedia comparison, distribution of budget and decision on terms (Kliment, 2005; Pelsmacker et al., 2010; WEMF, 2010). For our fourth research question (*RQ 4*), we distinguished convenience goods (e.g. toothpaste), shopping goods (e.g. furniture), specialty goods (e.g. car), immaterial goods/services (e.g. haircut) and unsought goods (e.g. gravestone) (Kuhn & Zajontz, 2011). When looking at the market segments (*RQ 5*), there is differentiation between discount (low price/quality), general (medium price/quality) and premium

³ The remaining respondents were working in advertising, on the client side or in other fields. Research indicates that they tend to process criteria differently when compared with media planning professionals (King, Reid, and Macias (2004)). As the number of completed questionnaires in those groups was very small and the paper focuses on media planners, we excluded them from our analysis.

⁴ Concerning years of experience, 2.00% of the respondents had up to one year of experience, 23.20% had up to 2-5 years, 26.30% had up to 6-9 years, 25.30% had up to 10-15 years and 23.20% had more than 15 years.

⁵ 15.00% of the respondents were responsible for 100,000-2,000,000 CHF/EUR, 37.40% for 2,000,001-10,000,000 CHF/EUR, 30.30% for more than 10,000,000 CHF/EUR and 17.20% did not answer.

⁶ Respondents rated different quantitative and qualitative criteria in previous questions and knew what those terms referred to.

(high price/quality) categories (Pechtl, 2005). Research question six addresses media planning strategies (*RQ 6*): agglomeration (focus on one area), broad (as many people as possible), deep (as many contacts per person as possible), dominance (increased presence in one type of medium), pulsation (advertising in phases) and recency (reaching target person directly before buying decision) (Dahlen, Lange, & Smith, 2010; WEMF, 2010). Finally, we asked about the media brand and different types of media: cinema, newspaper, magazine, online, radio, and television (*RQ 7*). The importance of the media brand for all items was rated on a five-point Likert scale (1 = not important, 5 = very important). Their order was randomized for *RQ 2*, *RQ 4*, *RQ 5*, *RQ 6* and *RQ 7*. In a pre-test amongst a small number of students, we checked the technical functionality of the questionnaire.

For our analysis, we conducted paired difference tests with SPSS⁷, which allows us to investigate differences in the importance of the media brand in media planning. To be able to do so, we checked our data to be approximately normally distributed (Bortz, 2005). In order to facilitate the understanding of the results at first glance, we have chosen histograms as means of visualization. Items are ranked depending on media planners' ratings with horizontal lines indicating significant differences between contiguous items and all other items below.⁸ More detailed results can be found in the appendix.

5 Results

5.1 Qualitative versus quantitative selection criteria

When asked about the relation of quantitative to qualitative selection criteria (*RQ 1*), media planners in Austria and Switzerland rated the former as more important. While 3.00% favoured them 90:10 and 45.50% compared them 70:30, 38.40% saw them as equal. 13.10% said that qualitative criteria would be more important than quantitative.

⁷ T-tests for differences between countries did not show any systematic differences or patterns, which confirms the similar market conditions we assumed.

⁸ Results for *RQ 3* are not ranked depending on importance but remain in order of the media planning process.

5.2 The media brand and other qualitative criteria

Amongst the qualitative criteria (*RQ 2*; see Figure 1), the media mix fit is most important according to media planners [mean (*M*) = 4.34, standard deviation (*SD*) = 0.79]. They also rate image/credibility (*M* = 4.17, *SD* = 0.83), impact (*M* = 4.09, *SD* = 0.73), editorial environment (*M* = 3.99, *SD* = 0.78), function (*M* = 3.91, *SD* = 0.83) and target group (*M* = 3.88, *SD* = 0.90) comparably high. Significantly less important is the media brand (*M* = 3.52, *SD* = 0.94), as well as personal experience (*M* = 3.43, *SD* = 1.05), information conveyed (*M* = 3.34, *SD* = 0.81) and intuition (*M* = 3.25, *SD* = 1.11).

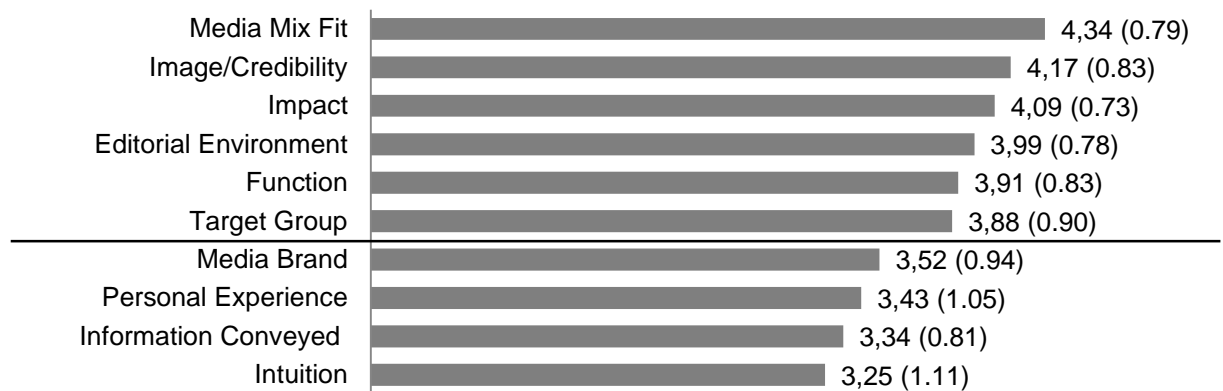


Figure 1: Importance of qualitative selection criteria in the media planning process; *n* = 99; average on five-point Likert scale; solid line indicates significant differences between contiguous items and all other items below; — *p* < 0.01 — *p* < 0.05 (paired difference test)

5.3 The media brand in the media planning process

Concerning the importance of the media brand in the media planning process, the results show significant differences across the various steps (*RQ 3*; see Figure 2). Media planners rated intramedia comparison, which is the comparison of different media outlets, the highest (*M* = 3.99, *SD* = 0.74). Significantly less important are the distribution of the budget (*M* = 3.59, *SD* = 0.94) and the decision on the terms (*M* = 3.54, *SD* = 0.92) such as timing and frequency. In the beginning of the process, the media brand is significantly less important for intermedia comparison (*M* = 3.02, *SD* = 0.99), which means comparing different channels, and the briefing of the agency (*M* = 2.80, *SD* = 1.19).

Results



Figure 2: Importance of the media brand in the media planning process; $n = 99$; average on five-point Likert scale; solid line indicates significant differences between contiguous items and all other items below; — $p < 0.01$ — $p < 0.05$ (paired difference test)

5.4 The media brand and types of goods

We also see significant differences for the various types of goods investigated (*RQ 4*; see Figure 3). According to media planners the media brand is most important when advertising specialty goods such as luxury products ($M = 4.62$, $SD = 0.67$). Significantly less important is the media brand for shopping goods ($M = 3.96$, $SD = 0.76$), which are characterized through an intentional search and decision process. Immaterial goods/services follow ($M = 3.69$, $SD = 0.78$). The media brand is least important for convenience goods i.e. products of everyday consumption ($M = 2.79$, $SD = 0.95$) and unsought goods i.e. products bought because of unpleasant circumstances ($M = 2.71$, $SD = 1.18$).



Figure 3: Importance of the media brand for advertising different goods; $n = 99$; average on five-point Likert scale; solid line indicates significant differences between contiguous items and all other items below; — $p < 0.01$ — $p < 0.05$ (paired difference test)

5.5 The media brand and market segments

The results for different market segments point in a similar direction (*RQ 5*; see Figure 4). The media brand is most important in the premium segment ($M = 4.66$, $SD = 0.61$), which stands for high price and/or quality. For the general segment with medium price and/or quality, it is valued significantly less ($M = 3.34$, $SD = 0.76$). According to media planners, the media brand is least important when advertising in the discount category ($M = 2.31$, $SD = 0.80$; low price and/or quality).



Figure 4: Importance of the media brand for advertising in different market segments; $n = 99$; average on five-point Likert scale; solid line indicates significant differences between contiguous items and all other items below; $p < 0.01$ $p < 0.05$ (paired difference test)

5.6 The media brand and media planning strategies

When considering the importance of the media brand for different media planning strategies (RQ 6; see Figure 5), the media brand is rated the highest in a dominance strategy, which proposes an increased presence in just one type of medium ($M = 3.89$, $SD = 0.93$). This rating significantly differs from that for the other strategies. The next highest rating of the media brand is in a pulsation strategy ($M = 3.45$, $SD = 0.95$), which involves advertising in phases; followed by recency ($M = 3.38$, $SD = 1.07$), which involves reaching the target person directly before the buying decision; deep ($M = 3.33$, $SD = 1.11$), which involves achieving as many contacts per person as possible and finally agglomeration ($M = 3.16$, $SD = 0.93$), which involves concentrating on an area that has high consumption. The media brand is least important in a broad strategy ($M = 2.99$, $SD = 1.06$), which aims to reach as many people in the target group as possible.



Figure 5: Importance of the media brand for different media planning strategies; $n = 99$; average on five-point Likert scale; solid line indicates significant differences between contiguous items and all other items below; $p < 0.01$ $p < 0.05$ (paired difference test)

5.7 The media brand and media channels

Finally, we investigated the media brand and different media channels (RQ 7; see Figure 6). The media brand is most important when advertising in print media (magazine $M = 4.23$, $SD = 0.77$ and newspaper $M = 4.12$, $SD = 0.79$), but is rated significantly lower for online ($M = 3.78$, $SD = 0.92$). This is followed in succession by television ($M = 3.63$, $SD = 0.94$), radio ($M = 3.12$, $SD = 0.91$) and cinema ($M = 2.40$, $SD = 1.15$), all significantly different from one another.

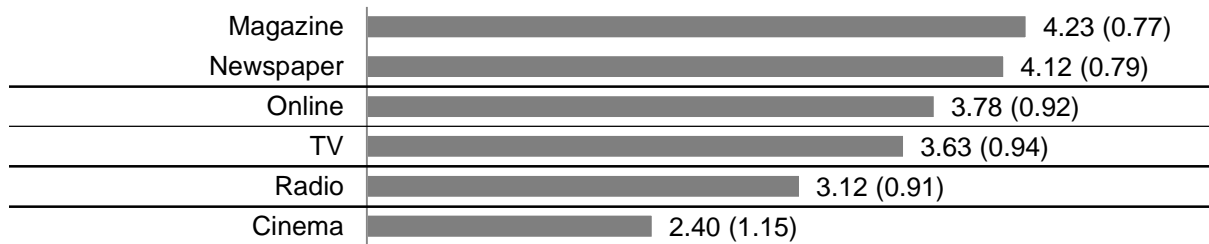


Figure 6: Importance of the media brand for advertising in different media channels; n = 99; average on five-point Likert scale; solid line indicates significant differences between contiguous items and all other items below; — $p < 0.01$ — $p < 0.05$ (paired difference test)

In the following section, these results are interpreted and discussed in further detail before conclusions are drawn and implications presented.

6 Discussion

It is hardly surprising that media planners rate quantitative selection criteria higher than qualitative selection criteria. However, the results show that the latter play an important role as well (*RQ 1*), a fact that has been previously highlighted in the literature (Pelsmacker et al., 2010). One of the respondents used the questionnaire's option for further remarks to conclude that 'qualitative criteria are difficult to argue. Clients need hard facts and want to see figures. Hence, the focus lies on quantitative performance'. This is confirmed by Rudi Kobza, an Austrian media planner, who explicitly calls for taking qualitative criteria into account: 'Media planning in its current form is a computer game. Often isolated in a theoretical model, calculating gross rating points based on probability of exposure. More than ever, strategy, creation and media have to be looked at as a whole and above all qualitatively, everything else is book keeping' (Horizont, 2014). His strong opinion might also be founded on qualitative criteria as an option for differentiation for media agencies, with all other measures being equal. While looking at quantitative performance is a must for everyone, qualitative criteria offer the potential for positioning and expertise. These developments make them especially interesting.

However, qualitative selection criteria vary in importance. Media planners in Austria and Switzerland rated media mix fit, image/credibility, impact, editorial environment, function and well-defined target group highest (*RQ 2*). While the media brand itself is significantly less important, all the highly-rated criteria as listed earlier are related to it. Concerning the media mix, the media brand is valuable as it is the connecting element of a multichannel service, offering different options. The image/credibility is

the audience's perception of the media brand. As shown earlier, the media brand can also stand for involvement and the function of a medium as well as its editorial environment and target group (see section 2.3). Despite these connections, one respondent concluded that the whole matter is not worth its discussion: 'I assume that the chatter about media brands is artificially created by legacy media. Basically, it is the old topic of qualitative versus quantitative criteria – which the quantitative have won.' Another respondent raised a problem with media brands in media planning: 'The importance of media brands is normally not recorded on a broad basis, in other words, subjective.' This, again, points out the focus on quantitative figures, also when dealing with qualitative information. Several papers have tried to fill that void with models quantifying the latter (e.g. Lynch & Stipp, 1999; Philport, 1993). Their aim is to establish a standard of measurement accepted in the industry. In line with these developments in media planning practice, personal experience, information conveyed and intuition are the least important qualitative criteria.

When looking at the results for the importance of the media brand in the media planning process (RQ 3), the media brand is rated highest for intramedia comparison, which is the actual relation of one outlet to another. In this step, not only quantitative criteria count but also qualitative characteristics such as the media brand (Knuth et al., 2013; Ots & Wolff, 2008). Media planners consider the match (or the mismatch) between the promotional message and the media product. In addition, the media brand image can be a valuable benefit of advertising in a certain media outlet. An advert in the *New York Times* might benefit from the media brand's credibility compared to a competing news organisation with similar reach but different reputation. In contrast, the media brand is least important for the agency briefing. This is rather surprising as one would expect advertisers and advertising agencies to appreciate the fit of their promotional message with the means of delivery. Siegert (2001) even suggests equal collaborations between media brands and advertisers. Therefore, media companies need to work on their branding strategies with advertisers and advertising agencies in order to increase the awareness of their media brand. This gives them the opportunity to stand out in the first stage of the media planning process, making it more likely to sell their advertising space and time. Offering training events to educate media planners about their brand could be an option (Knuth et al., 2013).

Differences between types of goods match their characteristics (RQ 4). The media brand is most important for the most exclusive products: specialty goods. In this category, the match with the promotional message is particularly relevant. Media planners may achieve a transfer of the glamorous lifestyle of *Sex and the City* or *Cosmopolitan* to products advertised in this context (Ots & Wolff, 2008). Comparably difficult is advertising for immaterial goods/services, as branding is hard and the level of

quality might differ. As a consequence, the media brand seems to be valued less. However, when for instance advertising financial services, the promotional message potentially benefits from the audience trusting a media brand. This indicates that the value of the media company's brand differs depending on the advertised good. Hence, media organizations would want to emphasize their brand for certain types of goods but focus on other criteria when it is less important.

Looking at the importance of the media brand for different market segments, results are in line with their characteristics (RQ 5). The media brand is rated highest in the premium segment, which corresponds with specialty goods. Media planners rate qualitative criteria higher, when it comes to high product quality. They seem to focus less on reach and more on a media brand representing, for instance, certain audience characteristics. As quality and price decrease, the media brand becomes less important. In the discount segment, which stands for high quantities, reaching as many contacts as possible is more important than a perfect fit between promotional message and media brand. Media companies should either exploit their brand or focus on other criteria, whichever is more appropriate.

We found that media brands are significantly more important for the media planning strategy of dominance (RQ 6), which means an increased presence in just one type of medium. This is linked to intramedia comparison in the media planning process for which the media brand is most important. One respondent questioned the relation of the media brand and the media planning strategy, which is supported by our results not showing significant differences. Therefore, we conclude that the importance of the media brand depends more on the client, for instance whether it is a specialty good and/or the discount segment, rather than the approach the media planner selects. This is in line with one media planner pointing out that the relevance of the media brand might be different from case-to-case.

The media brand is most important when making selection decisions with print media (RQ 7), which matches previous results about activation and involvement of different types of media (Berkler, 2008; Tipps et al., 2006). Online outlets are often linked to traditional media, which might make an online brand more important as a well-established offline brand is being transferred. Branding of television and radio is more difficult because of less activation and involvement or even limited options of branding (Wilby & Conroy, 1994). As a consequence, the media brand is less important when buying advertising time. Media planners rank cinema last, when it comes to the importance of media brands in their selection decisions. This is in line with movie theatres rarely having a distinct positioning or a strong brand. These results show that companies in print media, in particular, should invest in their brands (Knuth et al., 2013).

7 Limitations & further research

Our results shine a first light on the role of the media brand in media planning. However, they also raise more questions. Media planners were not given a definition of the term *media brand* and could have interpreted it differently, which is the main limitation of our study. We assumed a common understanding based on media brands being frequently discussed in the industry (publications, trade press, etc.) and on the feedback of our expert. McDowell and Batten (2005) state that branding terminology is well established in the media industry; however, professionals lack an in-depth knowledge of media brand management. In addition, the media brand being related to other qualitative criteria may have caused a blurring of meanings. Future studies should try to improve the way of measurement and could aim for quantifying the effect of the media brand on advertisements compared to other media selection criteria. Based on our data, we are also unable to distinguish between product brands and company brands. However, media planners may want to evaluate the fit of the advertisement with the show's as well as the broadcaster's brand, which would be an interesting field for further research.

Other areas worth studying are (new) media planning models, incorporating media brands and other qualitative criteria. Differences depending on advertisers' goals might be interesting to examine. Studies should also look into how media planners' subjective perception of the media brand influences their decisions. It could represent a certain service quality, such as support in the buying process or a detailed reporting system, which makes media planners more likely to consider the media brand in the planning process (Knuth et al., 2013). There is also no research on differences in the importance of the media brand when comparing media planners with advertisers. Last but not least, the media brand should be included in studies investigating drivers of advertising revenue (Wirtz et al., 2011) and success factors in the media industry in general (Sommer & von Rimscha, 2013). We would then understand not only the media brand's role on the audience side and in the advertising market but also its importance for the media company as a whole.

8 Conclusion

Media planners rate quantitative selection criteria as more important compared to qualitative selection criteria, but the latter are still considered and are relevant in the media planning process (*RQ 1*). The

media brand itself is not rated as particularly important (*RQ 2*), but is connected to other qualitative criteria. In addition, only two out of 25 media brand-focused items were ranked below a mean of 2.50 (discount segment and cinema). Results show that the media brand is most important for media planners when advertising in magazines or newspapers (*RQ 7*). Therefore, companies in the print industry should invest in their brands as well as in branding strategies in the advertising market (Knuth et al., 2013). This becomes especially important when looking for advertisements from the specialty goods sector and/or the premium market segment for which the media brand is also rated higher (*RQ 4 & RQ 5*). Consequently, media brands should focus their efforts in this area as media outlets are also judged by their advertising, which influences the perception of content (Rosengren & Dahlén, 2013). However, the media brand is less valuable to media planners when buying space and time for advertising convenience goods, unsought goods or the discount market segment.

According to Baumgarth (2004b), strong media brands are more likely to be in the consideration set of decision-makers. As they are most important in intramedia comparison within the media planning process, media companies should work on standing out among their competitors in this phase. With the relevance of the media brand primarily depending on the client (type of good and market segment) rather than the media planning strategy (*RQ 6*), media companies could also target the first stage of the process. With media brands being part of the agency briefing, they would have an additional opportunity to stand out in order to sell more advertising space and time (*RQ 3*). Having their products and services present at the earliest stage of the media planning process might provide benefits such as cross-media advertising, offering opportunities across several platforms. In line with this argument, cross-media offers have been identified as a driver of advertising revenue (Knuth et al., 2013). Other areas that media brands might emphasize are their ability to achieve higher levels of activation and involvement. They can also stand for a certain target group (Coffey & Wurst, 2012).

Media managers need to define a unique set of associations and what the media brand stands for. They have to develop a clear brand strategy from their brand identity, for the audience as well as the advertising market, to position themselves in comparison to their competitors and to highlight their unique selling proposition. In doing so, media brands provide benefits to advertisers. However, these benefits, such as media brands creating higher activation and involvement with content and adverts alike as well as providing cross-media offers and a certain target group, need to be communicated to media planners and decision makers. Offering workshops for media planners to inform them about the brand might be a good starting point. Only by increasing awareness of what a media brand stands for and its benefits, will media companies be able to exploit their potential in the advertising market.

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Appendix

Table 1: Importance of qualitative selection criteria in the media planning process; n = 99; paired difference test; * p<0.05, ** p<0.01

	Media Mix	Image	Involvement	Editorial Environment	Role of the Medium	Target Group	Media Brand	Personal Experience	Information Conveyed
	T sig.	T sig.	T sig.	T sig.	T sig.	T sig.	T sig.	T sig.	T sig.
Image	1.87								
Involvement	2.80 **	0.92							
Editorial Environment	3.79 **	1.99 *	1.06						
Role of the Medium	4.41 **	2.77 **	2.16 *	0.89					
Target Group	4.31 **	3.03 **	2.01 *	1.02	0.31				
Media Brand	7.10 **	6.21 **	6.04 **	4.29 **	3.71 **	3.08 **			
Personal Experience	7.17 **	5.95 **	5.46 **	4.29 **	4.06 **	3.57 **	0.62		
Information Conveyed	10.27 **	8.08 **	7.65 **	6.55 **	5.68 **	5.31 **	1.57	0.82	
Intuition	8.39 **	8.15 **	6.67 **	5.62 **	4.99 **	5.05 **	1.91	1.78	0.75

Table 2: Importance of the media brand in the media planning process; n = 99; paired difference test; * p<0.05, ** p<0.01

	Agency Briefing	Intermedia Comparison	Intramedia Comparison	Distribution of Budget
	T sig.	T sig.	T sig.	T sig.
Intermedia Comparison	-2,02 *			
Intramedia Comparison	-9,30 **	-9,51 **		
Distribution of Budget	-5,98 **	-4,96 **	3,98 **	
Decision on Terms	-5,37 **	-4,40 **	4,38 **	0,52

Appendix

Table 3: Importance of the media brand for advertising different goods; n = 99; paired difference test; * p<0.05, ** p<0.01

	Specialty Goods	Shopping Goods	Immaterial Goods	Convenience Goods
	T sig.	T sig.	T sig.	T sig.
Shopping Goods	7,94 **			
Immaterial Goods	11,22 **	2,84 **		
Convenience Goods	15,55 **	11,00 **	7,68 **	
Unsought Goods	13,64 **	8,93 **	6,83 **	0,55

Table 4: Importance of the media brand for advertising in different prize segments; n = 99; paired difference test; * p<0.05, ** p<0.01

	Premium	General
	T sig.	T sig.
General	15,54 **	
Discount	22,82 **	13,95 **

Table 5: Importance of the media brand for different media planning strategies; n = 99; paired difference test; * p<0.05, ** p<0.01

	Dominance	Pulsation	Recency	Deep	Agglomeration
	T sig.	T sig.	T sig.	T sig.	T sig.
Pulsation	3,87 **				
Recency	3,85 **	0,58			
Deep	4,59 **	0,88	0,37		
Agglomeration	6,11 **	2,80 **	2,02 *	1,38	
Broad	7,51 **	3,68 **	2,83 **	2,96 **	1,46

Table 6: Importance of the media brand for advertising in different media channels; n = 99; paired difference test; * p<0.05, ** p<0.01

	Magazine	Newspaper	Online	TV	Radio
	T sig.	T sig.	T sig.	T sig.	T sig.
Newspaper	1,35				
Online	3,50 **	2,83 **			
TV	5,65 **	4,47 **	2,22 *		
Radio	10,54 **	9,85 **	4,53 **	5,22 **	
Cinema	13,42 **	13,13 **	7,76 **	9,31 **	6,15 **

Sommer & von Rimscha (2013): Was macht Medien erfolgreich?

Eine Übersicht und Systematisierung der prozess- und angebotsbezogenen Erfolgsfaktoren.
MedienWirtschaft, 10(2), 10–27.

Abstract

In Zeiten des Wandels und großer Unsicherheit ist es für Medienunternehmen von existenzieller Bedeutung, sich über die Erfolgsfaktoren ihrer Angebote im Klaren zu sein. Obschon eine Vielzahl an Studien zu Erfolgsfaktoren von unterschiedlichen Medien vorliegt, sind diese in ihrer Anlage meist so fokussiert oder selektiv, dass sie nur bedingt als handlungsleitend für das Medienmanagement gelten können. Der Beitrag liefert einen gattungsübergreifenden Literaturüberblick, diskutiert Möglichkeiten der Verallgemeinerung von Detailergebnissen und zeigt auf, wie die vorliegende Forschung noch besser nutzbar gemacht werden könnte.

1 Problemstellung

Medienunternehmen geraten aufgrund sich ändernder Rahmenbedingungen in den Bereichen Wirtschaft, Politik, Technologie und Gesellschaft zunehmend unter Druck. Dies zwingt Medienmanager dazu, einerseits Produkte weiterzuentwickeln sowie andererseits neue Angebote zu entwickeln und auf den Markt zu bringen. Dabei steigt die Konkurrenz zwischen Medienteilmärkten aufgrund technologischer und inhaltlicher Konvergenz.

Die Bedeutung von Entwicklungsprozessen in Medienunternehmen wird in der Literatur vielfach betont (Kaye & Quinn, 2010, p. 14; van Weezel, 2010, pp. 47–49), die Forschung dazu steckt jedoch noch in den Kinderschuhen (Köhler, 2005, p. 75). Analog lässt sich auch in der Medienpraxis ein Defizit in Innovation und Forschung & Entwicklung erkennen (Adams, 2008, p. 64; Cunningham, Cutler, Hearn, Ryan, & Keane, 2004, p. 175; Dal Zotto & van Kranenburg, 2008, p. xvii; Hawkes, Künstler, Vogelsang, & Benzin, 2009, p. 16; Hollifield, 2001, p. 141; Kaye & Quinn, 2010, p. 149; Mueller-Oerlinghausen & Sauder, 2003, p. 32; Nordqvist et al., 2010, p. 54; Picard, 2002b, p. 243).

Im Kontext dieser Defizite in wissenschaftlicher und angewandter Forschung ist das Wissen um die Rolle von Erfolgsfaktoren von Medien entsprechend wertvoll. In der Literatur finden sich bereits zahlreiche Studien zu den Mediengattungen Buch und Film (Blömeke et al., 2007 bzw. Clement, 2004), da hier die Frequenz der Produktneuentwicklungen höher und die Datenverfügbarkeit in Bezug auf die Projekteigenschaften und den Erfolg vergleichsweise gut ist. Zu periodischen (Print-) Medien liegen dagegen merklich weniger Ergebnisse vor. Allen Studien gemein ist jedoch das Problem, dass sie sich jeweils auf einen Faktor oder eine enge Auswahl an Faktoren konzentrieren. Wechselwirkungen zwischen den Einflussfaktoren werden so häufig vernachlässigt. Darüber hinaus kann es vorkommen, dass einzelne Faktoren nur deshalb einflussreich erscheinen, weil sie als Proxy für Einflüsse wirken, die nicht in die Analyse mit aufgenommen wurden. Zudem werden Untersuchungen meist gattungsspezifisch und innerhalb bestimmter Länderkontexte durchgeführt. Bislang fehlt eine Zusammenführung der uneinheitlichen und stark fragmentierten Ergebnisse zu periodischen und nicht-periodischen Medien.

Es stellt sich die Frage wie bestehende Forschungsergebnisse zusammengefasst werden können, um zu einer Übersicht der Erfolgsfaktoren zu kommen, die gattungsübergreifende Aussagekraft besitzt. Dies ist dringend nötig, da immer mehr Medienangebote unter einem Dach gebündelt werden, ein Unternehmen also seine Inhalte auf verschiedenen Kanälen anbietet und auf mehreren Märkten tätig ist (Carvajal & García Avilés, 2008; Colapinto, 2010; Siebert, 2003). So ist es mittlerweile üblich, dass

beispielsweise ein Verlag eine Tageszeitung, ein dazugehöriges Online-Angebot und Bücher in seinem Produktportfolio hat. Für den vorliegenden Beitrag sollen Portfoliostrategien jedoch nicht berücksichtigt werden. Der Fokus liegt auf dem Erfolg von Produkten nicht auf dem von Unternehmen. Ziel ist es mit Hilfe einer Literaturübersicht einen umfassenden Überblick der deutsch- und englischsprachigen Forschung zu liefern, um den Status-quo der empirischen und theoretischen Erfolgsfaktorenforschung für Medien abzubilden und aus diesem Überblick weiteren Forschungsbedarf abzuleiten.

Dementsprechend werden in dieser Übersicht Erfolgsfaktoren in der Literatur identifiziert, gebündelt und systematisiert. Zunächst erfolgt eine Erklärung des Vorgehens und der einzelnen Analyseschritte (Abschnitt 2). Daran schließt sich die Darstellung der Ergebnisse bisheriger Forschungsarbeiten (Abschnitt 3). Diese werden in der Folge bewertet (Abschnitt 4), woraus sich abschließend weiterer Forschungsbedarf ableiten lässt (Abschnitt 5).

2 Analyse

Bei der Recherche relevanter Literatur wird stichwortorientiert vorgegangen. Die Suchkriterien leiten sich aus den für die Fragestellung relevanten Dimensionen ab, also dem Erfolg auf der einen und den verschiedenen Mediengattungen auf der anderen Seite: Erfolg, Erfolgsfaktor, Buch, Zeitung, Zeitschrift, Magazin, Print, Radio, TV, Fernsehen, Rundfunk, Film, Kino (analog auf Englisch).

Für die Literaturrecherche wird auf die Datenbanken Google Scholar, Communication and Mass Media Complete und Business Source Premier zurückgegriffen. Google Scholar ist eine auf wissenschaftliche Literatur spezialisierte Suchmaschine, die Volltexte liefert, wenn diese kostenlos erhältlich sind, oder auch auf die jeweiligen Quellen verweist. Die Datenbank Communication and Mass Media Complete erfasst Artikel in mehr als 620 Fachzeitschriften, von denen mehr als 500 im Volltext zur Verfügung stehen. Business Source Premier bietet Volltexte aus mehr als 2100 Fachzeitschriften. Dazu zählen unter anderem The International Journal on Media Management, Journal of Media Economics, Journal of Media Business Studies, sowie Marketing Science, Journal of Marketing, Journal of Marketing Research, International Journal of Research in Marketing, Marketing Letters, Management Science, Journal of Strategic Management und Journal of Cultural Economics, die auch in früheren Literaturübersichten berücksichtigt sind (Clement, 2004, p. 252).

Es fließen die Ergebnisse von insgesamt 127 Studien, zum Teil über Literaturüberblicke (Blömeke et al., 2007; Clement, 2004; Simonton, 2009), ein. Diese zielen allesamt auf Verallgemeinerbarkeit,

Einzelfallstudien („Die Erfolgsgeschichte der Zeitung X“) gehen nicht ein. Erfolgsfaktoren, die nicht in medialen Kontexten erhoben werden, finden keine Berücksichtigung, da sich Medien durch zahlreiche Besonderheiten auszeichnen und sich Erfolgsfaktoren aus anderen Industrien nicht ohne weiteres übertragen lassen (Büsching et al., 2011, p. 15; Köhler, 2005, p. 77). Die folgenden Faktoren werden dementsprechend in der Medienbranche erhoben, beziehungsweise explizit für mediale Angebote aufgestellt.

Der Fragestellung entsprechend erfolgt eine Verknüpfung der Erfolgsfaktoren, die die Forschung für unterschiedliche Mediengattungen identifiziert, teils theoretisch abgeleitet, teils empirisch erhoben. Die Literatur kann insgesamt als stark fragmentiert bezeichnet werden, da sich keine einheitlichen Standards hinsichtlich der relevanten Grundgesamtheit, der verwendeten Methodik oder bezüglich der Erfolgsmasse und Einflussgrößen zeigen. Nichtsdestotrotz lassen sich gemeinsame Muster erkennen, die eine Aggregation und Abstraktion der Ergebnisse ermöglichen. Das liegt nicht zuletzt an den Besonderheiten medialer Angebote, die Buch, Zeitung, Zeitschrift, Radio, TV und Film gemein haben. Medien sind Erfahrungs- und Vertrauensgüter, bei denen eine Qualitätsbeurteilung erst ex post oder gar nicht erfolgen kann (z. B. Heinrich, 2010a; Kiefer, 2005, pp. 141–142; Siegert, 2001, p. 109). Ihre Qualität muss den Rezipienten durch zusätzliche Informationen und in Abgrenzung zu den Wettbewerbern signalisiert werden. Hohe Qualität (im Sinne einer Adressierung der Nutzerbedürfnisse) reicht somit für den Erfolg nicht aus, sie ist auch bereits ex ante wirkungsvoll zu vermitteln. Weiter werden Medien in der Regel im Rahmen einer Mischfinanzierung aus verschiedenen Quellen finanziert. Bei werbefinanzierten Medien bringt das die Schwierigkeiten der Planung in zweiseitigen Märkten mit sich (z. B. Dewenter & Haucap, 2009), doch auch bei Medien ohne Werbefinanzierung, wie Kinofilme oder Bücher, müssen neben den Rezipienten meist auch die Ansprüche von weiteren Geldgebern wie zum Beispiel einer kulturell oder standortpolitisch motivierten Förderung berücksichtigt werden (z. B. Castendyk, 2008; Knorr & Schulz, 2009). Damit ist schon eine dritte Besonderheit erwähnt: der Doppelcharakter der Medien als Kultur- und Wirtschaftsgut. Medien sind eben nicht nur kommerzielle Produkte, ihre besondere Verantwortung für die Gesellschaft, die Demokratie und die Kultur ist durch die Verfassung geschützt. Dies wird nicht nur in Zielvorgaben für Public Service Anbieter deutlich, sondern wirkt sich auch auf die Medienmacher aus, die häufig nicht gewinnorientiert sind (Ribstein, 2012), sondern „Erfolg“ auch aus einer künstlerisch-kreativen oder gesellschaftlichen Perspektive verstehen (z. B. von Rimscha & Siegert, 2011).

Die folgende Analyse basiert auf drei Schritten: (1) Erfolgsfaktoren identifizieren, (2) die Ergebnisse aggregieren und abstrahieren, sowie die daraus resultierenden Bündel abschließend (3) systematisieren.

Im ersten Schritt fällt auf, dass Erfolgsfaktoren in der Buch- und Filmindustrie deutlich häufiger erforscht werden, als es für periodische Medien der Fall ist. Hier finden sich nur vereinzelt empirische Studien. Ein Grund dafür könnte die stärker Projekt basierte Produktion und die daraus resultierende höhere Frequenz von neuen Angeboten sein.

Das folgende Aggregieren und Abstrahieren der Erfolgsfaktoren orientiert sich an den zentralen Begriffen bisheriger Forschung. Dazu zählen beispielsweise das Personalmanagement im Entwicklungsprozess, das Timing beim Veröffentlichungs- beziehungsweise Markteintrittszeitpunkt, der Inhalt des medialen Angebots, die multimediale Aufbereitung oder Größenvorteile.

Für die abschließende Einordnung und Systematisierung drängt sich die Unterscheidung nach Rahmenbedingungen, Prozess und Angebot auf. Der Einfluss von Wirtschaft, Politik, Technologie und Gesellschaft (Wolf, 2006) wird in der Literatur zwar betont, diese Rahmenbedingung lassen sich von den Unternehmen aber kaum beeinflussen. Dementsprechend liegt der Fokus auf den zwei letztgenannten Bereichen, Prozess und Angebot, die von Seiten des Managements aktiv gestaltet werden können. Erfolgsfaktoren des Entwicklungsprozesses werden anhand des in der Literatur postulierten typischen Ablaufs einer solchen Entwicklung systematisiert. Für das Angebot bietet sich eine Strukturierung anhand der verschiedenen Formen der Kreativität an. Im Fokus steht dabei jeweils die Abstraktion spezifischer Ergebnisse. Der Struktur und Nachvollziehbarkeit wegen, wird auf die Darstellung von Interaktionseffekten verzichtet.

3 Erfolgsfaktoren

Im Folgenden wird dargestellt welche Erfolgsfaktoren in der Literatur jeweils untersucht wurden und welche sich dabei als einflussreich erwiesen haben. Die Ergebnisse der verarbeiteten Studien sind jeweils vor dem Hintergrund des verwendeten Samples und der Variablenauswahl zu sehen, deshalb wird auf einen Vergleich der Effektstärken in unterschiedlichen Studien bewusst verzichtet (Tabellen 1-3 fassen die Faktoren, Effektstärken und Güte ausgewählter Studien zusammen). Es darf vermutet werden, dass zwischen den verschiedenen Einflussfaktoren auf den Erfolg jeweils mehr oder minder starke Wechselwirkungen bestehen, also zum Beispiel eine Variable nur dann einflussreich wird, wenn zeitgleich eine andere Bedingung erfüllt ist. Regressionskoeffizienten aus Studien, die keine

Interaktionseffekte modellieren, sollten somit mit Vorsicht interpretiert werden, da die Einflüsse gegebenenfalls verzerrt und nur eingeschränkt verallgemeinerbar sind. Wir kommen im Abschnitt 4.2 „Bewertung der bisherigen Forschung“ nochmals auf dieses Problem zurück und schlagen im Abschnitt 5 „Forschungsbedarf“ eine Lösung vor.

Weiter gilt es zu berücksichtigen, dass die Definition von Erfolg nicht in allen Studien identisch ist. Da jedoch grundsätzlich ökonomischer Erfolg untersucht wird (im Gegensatz zum Beispiel zu kreativem Erfolg), sind die Studien durchaus vergleichbar. Reichweite, Umsatz und Gewinn sind zwar nicht identisch, dürften jedoch jeweils recht stark korrelieren. Vor diesem Hintergrund scheint uns eine Strukturierung nach Erfolgsmaßstäben nicht zwingend. Wenngleich die Art des Erfolgs wichtig ist, bleibt für das Medienmanagement jedoch von größerer Bedeutung, um welche Art Erfolgsfaktor es sich handelt: ist es eine Charakteristik des Entwicklungs- und Produktionsprozesses oder eine Eigenschaft des Produkts? Davon abhängig bieten sich Medienmanagern unterschiedliche Ansatzpunkte.

3.1 Erfolgsfaktoren im Entwicklungsprozess

Neu- und Weiterentwicklungen werden in Medienunternehmen in Form von Projekten gesteuert, vertrieben und vermarktet, wie beispielsweise Kino-Filme, TV-Formate, Internetplattformen und Apps (Büsching et al., 2011, pp. 14–15). Dabei handelt es sich stets um einen kreativen Prozess (von Rimscha & Przybylski, 2012). Die temporäre Organisation in Projekt-Form ist die vorläufige Antwort auf den Innovationsdruck, da sie sich insbesondere dazu eignet, das Risiko auf mehrere Vorhaben zu verteilen (Nausner, 2002, p. 116, 137). In diesem Zusammenhang bieten sich auch Produkt-Portfolios an (Picard, 2005, p. 2). Im Entwicklungsprozess lassen sich fünf Phasen unterscheiden: (1) Entwurf und Definition, (2) Konzeption und Entwicklung, (3) Gestaltung und Spezifikation, (4) Realisierung und Produktion, (5) Implementierung und Post-Produktion (Nausner, 2002, pp. 138–143), wobei insbesondere die ersten drei für die Entwicklung im engeren Sinne von Bedeutung sind. Die fünf Phasen sollen in der Folge als Rahmen für die Systematisierung der Erfolgsfaktoren des Entwicklungsprozesses medialer Angebote dienen.

In der Phase „(1) Entwurf und Definition“ gilt Entrepreneurship als Erfolgsfaktor, also die Frage inwieweit neue Ideen gefördert und Risiken eingegangen werden (Habann, 2010, p. 220). Es zeigt sich, dass Alter, Ausbildung und beruflich soziale Einbettung von Verlagsleitern den Erfolg neuer Magazine beeinflussen (Tschörtner, 2008, p. 347). Auch der Projektleitung kommt besondere Bedeutung zu, wie

sich beispielsweise für den Erfolg von Medieninnovationen zeigt (Habann, 2010, p. 218). Führungskompetenz und Fachwissen gelten in Onlineprojekten als wichtige Faktoren (Büsching et al., 2011, p. 20). Neben der Projektleitung sind die übrigen Mitarbeiter relevant. Ihre Fähigkeiten und ihre Motivation beeinflussen den Erfolg neuer Zeitschriften (Bleis, 1996, pp. 277–279). Für TV-Sender erweisen sich Führung, Motivation und Qualifikation der Mitarbeiter als entscheidend (Wolf, 2006, p. 329). In der Filmbranche ist wichtig, dass Teammitglieder bereits zuvor erfolgreich gearbeitet haben und so über möglichst viel Erfahrung verfügen (Meiseberg & Ehrmann, 2008, pp. 367–368). Es zeigt sich, dass das Management kreativen Personals Besonderheiten mit sich bringt, etwa die notwendige Freiheit für die Kreativen oder die Unsicherheit darüber, wie viel Zeit für das unterbewusste Reifen einer Idee notwendig ist (von Rimscha & Przybylski, 2012). Zudem sind die Unterstützung des Projekts durch die Unternehmensführung, einen Machtpromotor und einen Fachpromotor Faktoren für den Erfolg von Zeitschriften (Bleis, 1996, pp. 277–279). Bereits zu einem frühen Zeitpunkt sind Fragen der Markenführung zu klären (Baumgarth, 2004a). Im Falle einer Markentransferstrategie stellen die Muttermarke (Chang & Chan-Olmsted, 2010; Habann, Nienstedt, & Reinelt, 2008a) und der Markenfit (Bleis, 1996; Chang & Chan-Olmsted, 2010; Habann et al., 2008a) Erfolgsfaktoren dar.

Für „(2) Konzeption und Entwicklung“ sowie „(3) Gestaltung und Spezifikation“ sind die Ergebnisse zu Rezipientenintegration und Marktforschung von besonderer Bedeutung. Kunden in den Innovationsprozess zu integrieren erweist sich als Erfolgsfaktor von Medieninnovationen (Habann, 2010, p. 218) und wird Tageszeitungen explizit empfohlen (Schnell, 2008, p. 475). Damit eng verbunden ist die Markt- und Meinungsforschung, die in Form von innovationsbezogener Umweltüberwachung einen Erfolgsfaktor darstellt (Habann, 2010, p. 220). So lassen sich wertvolle Informationen für die Planung und Entwicklung des Angebots sammeln (Schnell, 2008, p. 477; Wyatt, 1994, pp. 156–161; Yoder, 2004). Auch von Praktikerseite wird betont, dass es entscheidend ist, sein Publikum zu verstehen (Reich, 2009, p. 16).

Für die eben genannten Phasen, aber auch in der „Realisierung und Produktion (4)“ ist die Art der Kommunikation ein Erfolgsfaktor. Ein Mehr an Austausch ist jedoch nicht zwangsläufig förderlich; im Gegenteil, zu viel irrelevante Kommunikation kann einen negativen Effekt haben, wie sich bei Online-Projekten zeigt (Büsching et al., 2011, p. 19). Über die drei Phasen hinweg sind auch Aspekte der Medienmarke entscheidend (Rademacher & Siegert, 2007). Die Markenidentität von TV-Sendern stellt ebenso einen Erfolgsfaktor dar (Förster, 2011) wie das Branding des neuen Angebots (Baumgarth, 2004a).

Studien zum Abschluss des Prozesses, dem Markteintritt („(5) Implementierung und Post-Produktion“), gibt es vor allem für die Film- und TV-Branche. Timing und Veröffentlichungszeitpunkt werden hier als Erfolgsfaktoren beschrieben (Chang & Ki, 2005; Clement, 2004, p. 258; Elliott & Simmons, 2008; Feddersen & Rott, 2011; Hennig-Thurau, Henning, Sattler, Eggers, & Houston, 2007; Hennig-Thurau, Houston, & Heitjans, 2009, p. 174; Joshi & Mao, 2012, p. 565; Lee, 2009; Reinstein & Snyder, 2005; Shamsie et al., 2006, p. 132; Simonton, 2009, pp. 412–413; Zabel, 2009, pp. 296–297). Damit steht die Auseinandersetzung mit der Konkurrenzsituation (Clement, 2004, p. 258; Kim, 2009; Meiseberg & Ehrmann, 2008; Shamsie et al., 2006, p. 132; Simonton, 2009, p. 414) und die Laufzeit (Simonton, 2009, p. 410) im Zusammenhang. Ähnliches gilt auch für den Buchmarkt (Blömeke et al., 2007; Schmidt-Stölting, Blömeke, & Clement, 2011). Als Besonderheit kommt hinzu, dass entlang der Auswertungskette mehrere Veröffentlichungszeitpunkte koordiniert werden müssen (Frank, 1994, p. 130; Hennig-Thurau et al., 2007). Jenseits der Film und Fernsehbranche ist auch für Magazine der Zeitpunkt des Markteintritts entscheidend (Bleis, 1996, p. 279; Tschörtner, 2008, p. 347). Bei neuen Zeitschriften sind Wettbewerbsintensität auf dem Rezipienten- und dem Anzeigenmarkt wichtige Faktoren (Tschörtner, 2008, p. 347). Obwohl es sich dem Ablauf nach um das Ende des Prozesses handelt, werden Überlegungen dazu bereits in den ersten Phasen angestellt.

Unabhängig von der jeweiligen Entwicklungsstufe sind in der TV-Produktion die Gestaltung der Kooperation zwischen Auftraggeber und Auftragnehmer anhand klarer Rollenverteilung und klarer Vereinbarungen sowie das Controlling des Entwicklungs- und Produktionsprozesses hinsichtlich Qualität, Kosten und Zeit Faktoren für den Erfolg (Zabel, 2009, pp. 286–296).

3.2 Erfolgsfaktoren des medialen Angebots

Das Ergebnis des erfolgreichen Entwicklungsprozesses kann als der vermarktbare Teil der Kreativität verstanden werden. Abhängig vom Objekt der Kreativität lassen sich dabei kulturelle, technische und ökonomische Kreativität unterscheiden (von Rimscha & Przybylski, 2012, p. 3). In allen drei Bereichen sind jeweils spezifische kreative Prozesse sowie Talente und Fähigkeiten der Kreativen notwendig, deren Ergebnisse sich jeweils als Erfolgsfaktoren interpretieren lassen. Bei der kulturellen Kreativität geht es um die “manipulation of symbols for the purposes of entertainment, information and perhaps even enlightenment” (Hesmondhalgh, 2007, p. 5). Das Ergebnis sind also neue Inhalte oder eine neuartige Rekombination von bekannten Inhaltselementen. Dagegen fokussiert die technische

Erfolgsfaktoren

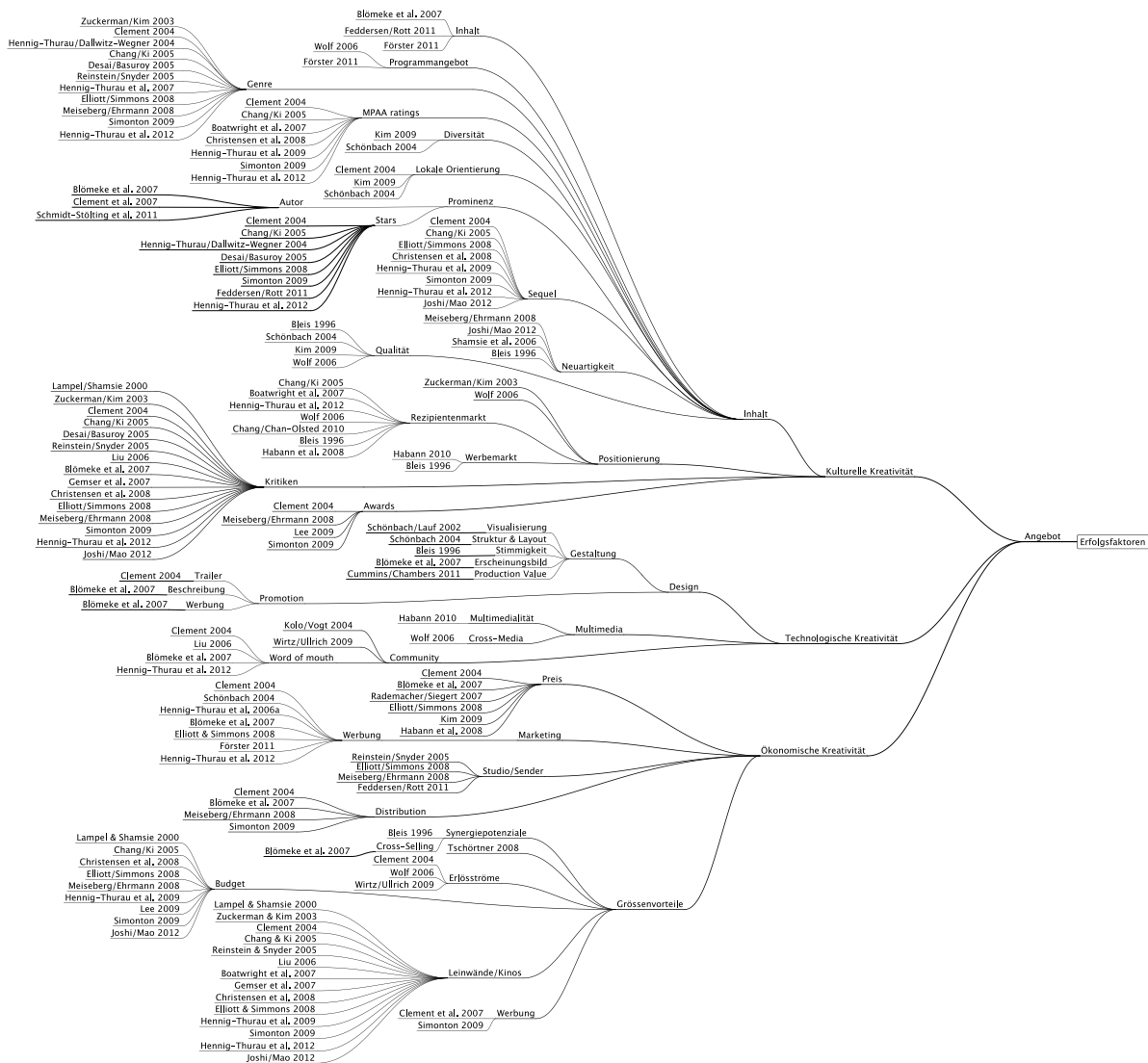
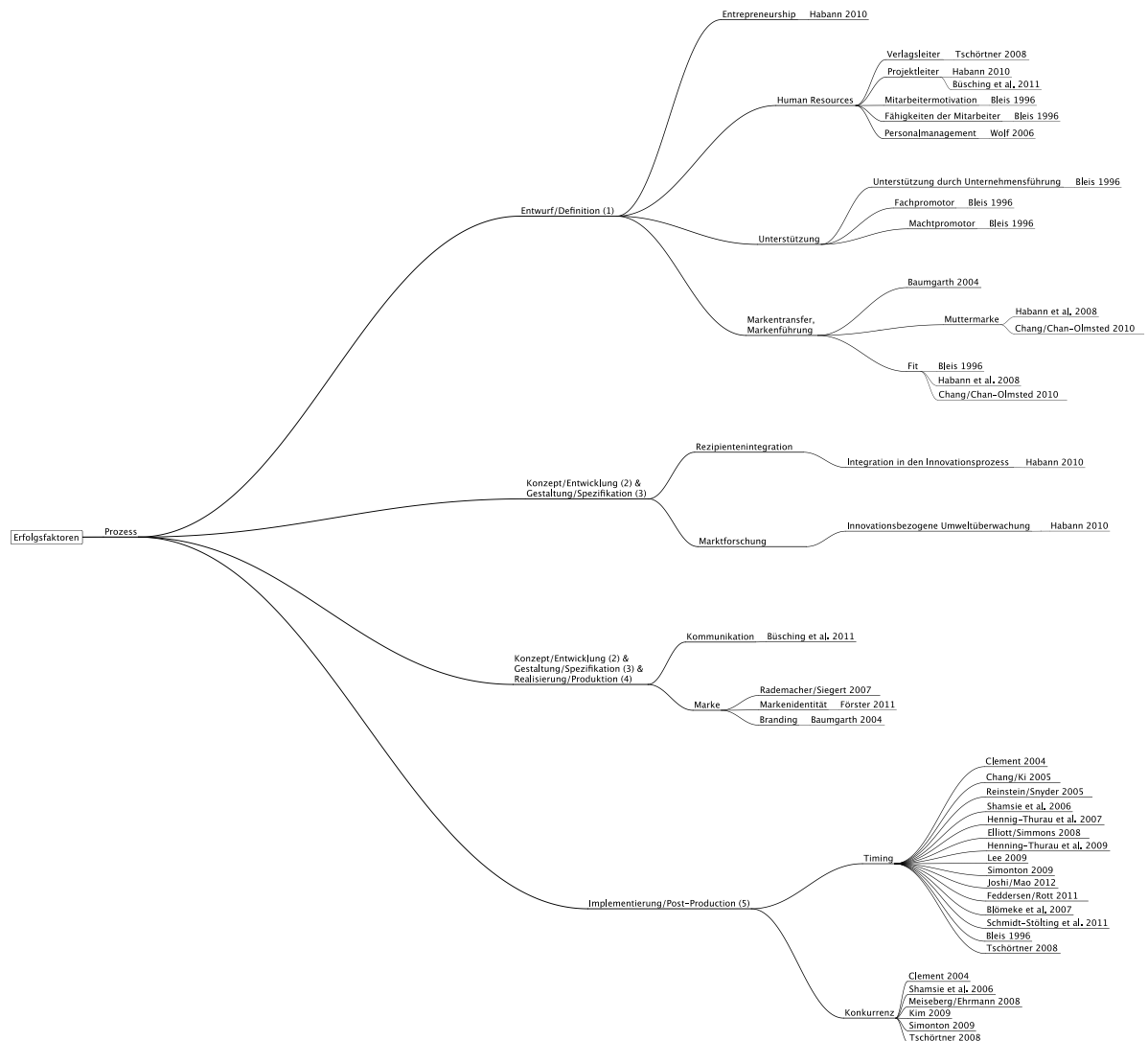


Abbildung 1: Was macht Medien erfolgreich?

Kreativität auf die Lösung von (technischen) Problemen. Es gilt neuartigen Lösungen für gegebenenfalls alte Probleme zu finden. Die ökonomische Kreativität lässt sich ebenfalls als Problemlösung verstehen, allerdings liegt hier der Fokus auf ökonomischen Problemen und Ergebnissen, also etwa der Allokation der Produktivkräfte oder der Optimierung der Vermarktung. Die Dreiteilung soll im Folgenden als Rahmen für die Systematisierung der Erfolgsfaktoren des medialen Angebots - verstanden als Ergebnis von kreativen Prozessen - dienen.

Erfolgsfaktoren



Der Inhalt des medialen Angebots ist das Ergebnis der kulturellen Kreativität. Er gilt als Erfolgsfaktor von Büchern, Zeitungen und TV-Sendungen (Blömeke et al., 2007, pp. 424–431; Feddersen & Rott, 2011, p. 365; Förster, 2011; Schönbach, Lauf, Stürzebecher, & Peiser, 1997). Bei TV-Sendern beeinflusst das Programmangebot den Erfolg der Fernsehveranstalter (Förster, 2011; Wolf, 2006, p. 329). Im Film-Bereich sind das Genre (Chang & Ki, 2005; Clement, 2004, p. 256; Desai & Basuroy, 2005, pp. 216–217; Elliott & Simmons, 2008; Hennig-Thurau & Dallwitz-Wegner, 2004; Hennig-Thurau et al., 2007; Hennig-Thurau, Marchand, & Hiller, 2012, p. 271; Meiseberg & Ehrmann, 2008; Reinstein & Snyder, 2005; Simonton, 2009, p. 409; Wanderer, 2011; Zuckerman & Kim, 2003) und sich daraus ergebende Altersbeschränkungen wirksam (Boatwright, Basuroy, & Kamakura, 2007; Chang & Ki, 2005; Christensen, Clement, Papies, Schmidt-Stölting, & Briese, 2008; Clement, 2004; Hennig-Thurau et al., 2009, p. 174; Hennig-Thurau et al., 2012, p. 271; Simonton, 2009, p. 409). In der Zeitungsbranche erweist

sich Diversität und damit die Vielfalt der Inhalte als bester Weg (Schönbach, 2004). Vielfalt ist ebenso ein Erfolgsfaktor im Film-Bereich (Kim, 2009, p. 51). Dass sich lokale Orientierung positiv auf mediale Angebote auswirkt, wird für die Film- und Zeitungsbranche gezeigt (Clement, 2004, p. 257; Kim, 2009; Schönbach, 2004). Für den Online-Bereich ist die branchenspezifische Aggregation von privaten und professionellen Angeboten ein Erfolgsfaktor (Wirtz & Ullrich, 2009, p. 48). Von Praktikerseite werden ebenso die Zusammenführung von Informationen, aber auch die Kontextualisierung betont (Reich, 2009, pp. 16–17).

Einen weiteren Faktor stellt Prominenz dar. So beeinflusst etwa die Bekanntheit des Autors eines Buches den Erfolg (Blömeke et al., 2007, pp. 429–430; Clement, Proppe, & Rott, 2007; Schmidt-Stölting et al., 2011). Bei Filmen wirken sich Star-Regisseure und Star-Schauspieler positiv aus (Basuroy, Chatterjee, & Ravid, 2003, p. 116; Chang & Ki, 2005, pp. 254–255; Clement, 2004, pp. 254–255; Desai & Basuroy, 2005, pp. 216–217; Elberse, 2007, p. 118; Elliott & Simmons, 2008, p. 109; Feddersen & Rott, 2011, p. 365; Hennig-Thurau & Dallwitz-Wegner, 2004, p. 165; Hennig-Thurau et al., 2012, p. 271; Simonton, 2009, pp. 410–412). Ebenso wirkt sich auf den Erfolg aus, ob es sich um eine Fortsetzung (Sequel) (Chang & Ki, 2005; Christensen et al., 2008; Clement, 2004; Elliott & Simmons, 2008; Hennig-Thurau et al., 2009, p. 174; Hennig-Thurau et al., 2012, p. 271; Joshi & Mao, 2012, p. 565; Simonton, 2009, p. 408) oder ein neuartiges Angebot handelt (Bleis, 1996; Joshi & Mao, 2012; Meiseberg & Ehrmann, 2008; Shamsie et al., 2006). Über die beschriebenen Faktoren hinweg erstreckt sich der Aspekt der Beschaffung: Hochwertige Rechte stellen zum Beispiel bei TV-Sendern einen Faktor für den Erfolg dar (Wolf, 2006, p. 327).

Von Bedeutung ist auch die Qualität der Inhalte. Dies zeigt sich beispielhaft bei redaktionellen Inhalten von Zeitschriften (Bleis, 1996, p. 291), bei Zeitungen (Schönbach, 2004), Filmen (Kim, 2009, p. 51), und Unterhaltung der Fernsehveranstalter (Wolf, 2006, p. 330). Die Positionierung gilt als Erfolgsfaktor von TV- (Wolf, 2006) und Radio-Sendern (Greve, 1996). Auf wen das Angebot abzielt ist aber auch in der Film-Branche erfolgsrelevant (Hennig-Thurau et al., 2012, p. 271). Die Attraktivität für das Publikum (Boatwright et al., 2007), sowie Bedürfnisse der Zielgruppe besser zu befriedigen als dies Konkurrenzangeboten gelingt (Bleis, 1996, p. 291), sind wichtige Faktoren. Die Bedeutung der Rezipienten zeigt sich in weiteren Studien (Chang & Chan-Olmsted, 2010; Chang & Ki, 2005; Habann et al., 2008a; Wolf, 2006). Für Tageszeitungen wird eine Ausrichtung des Inhalts an den konkreten Bedürfnissen der Leser empfohlen (Schnell, 2008, p. 475). Ebenso gilt es jedoch die Werbekunden zu berücksichtigen. Deren Akzeptanz der Medieninnovation ist relevant für den Erfolg (Habann, 2010, p. 218). Analog zur Publikumsseite gilt es auch auf dem Werbemarkt, attraktiver als die Konkurrenz

zu sein und Bedürfnisse besser zu befriedigen, was etwa für neue Zeitschriften gezeigt wird (Bleis, 1996, p. 291).

Besonders intensiv wird die Bedeutung von Kritikern für die Buch- und Filmbranche erforscht. Sie gelten als Erfolgsfaktor, wobei sich die Ergebnisse bezüglich der Frage nach der Beeinflussung oder der Vorhersage des Erfolges unterscheiden (Blömeke et al., 2007, pp. 432–433; Chang & Ki, 2005; Christensen et al., 2008, p. 76; Clement, 2004, p. 259; Desai & Basuroy, 2005, pp. 216–217; Elliott & Simmons, 2008; Gemser, van Oostrum, & Leenders, 2007, p. 57; Hennig-Thurau et al., 2012, p. 271; Joshi & Mao, 2012, p. 565; Lampel & Shamsie, 2000, p. 253; Liu, 2006; Meiseberg & Ehrmann, 2008; Reinstein & Snyder, 2005, pp. 48–49; Simonton, 2009, pp. 403–404; Zuckerman & Kim, 2003). Besonders einflussreich scheint die polarisierende Diskussion des medialen Angebots, unabhängig von der Wertung (Clement et al., 2007, pp. 95–97; Hennig-Thurau et al., 2012, p. 271). Zudem wirken sich Auszeichnungen positiv auf den Erfolg aus (Clement, 2004, p. 260; Clement, Papies, & Schmidt-Stölting, 2009; Lee, 2009, p. 259; Meiseberg & Ehrmann, 2008; Simonton, 2009, p. 405).

Unter den kulturellen, vor allem aber den technischen Teil der Kreativität fällt die Art und Weise der Aufbereitung des Inhalts. Die formale Gestaltung wirkt sich beispielsweise bei Tageszeitungen durch Struktur und Layout auf Reichweiten aus und beeinflusst damit den Erfolg positiv (Schönbach, 2000, 2004; Schönbach & Lauf, 2002; Schönbach et al., 1997). Bei Publikumszeitschriften ist die Stimmigkeit der Gestaltung des Angebots ein wichtiger Faktor (Bleis, 1996, p. 291). Das Gleiche gilt für das Erscheinungsbild von Büchern (Blömeke et al., 2007, pp. 430–431). Im AV-Bereich sind Production Values von Bedeutung, die die Qualität aus einer technischen Perspektive beschreiben (Cummins & Chambers, 2011). Wichtig ist aber nicht nur das Angebot selbst, sondern auch wie Promotionsmaßnahmen gestaltet werden. So können beispielsweise Trailer (im Sinne einer Kurzfassung des Films) im Filmbereich (Clement, 2004, p. 259) oder die Elemente der Beschreibung eines Buches (Blömeke et al., 2007, p. 437) einen positiven Beitrag zum Erfolg leisten, indem sie die Unsicherheit der Rezipienten über den erwartbaren Inhalt reduzieren.

Unter technischer Kreativität lassen sich ebenso Aspekte der Multimedialität zusammenfassen. Diese bei der Produktarchitektur zu berücksichtigen ist ein Erfolgsfaktor von Medieninnovationen (Habann, 2010, p. 218). Cross-Media wird zudem als Erfolgsfaktor von Fernsehveranstaltern identifiziert (Wolf, 2006, p. 329).

Dank technischer Entwicklungen besteht für Medienunternehmen die Chance, eine Plattform zu schaffen auf der eine Community rund um das Angebot entsteht. Aus der Perspektive der Praxis ist diese nötig und gegebenenfalls der Ursprung der besten Inhalte (Reich, 2009, p. 16). Auch in der

wissenschaftlichen Literatur wird die Integration der Rezipienten in das konkrete Angebot als Erfolgsfaktor dargestellt (Habann, 2010, p. 218). Starke Bindung an ein Angebot, hohes Involvement und die Nutzungsintensität im Online-Bereich stehen damit im Zusammenhang (Kolo & Vogt, 2004). Ebenso wird die Bedeutung von Partizipation, Motivation und Verbindung der Nutzer betont (Wirtz & Ullrich, 2009, p. 53). Für Buch und Film zeigt sich zudem, dass Word-of-Mouth eine wichtige Rolle spielt (Blömeke et al., 2007, p. 433; Clement, 2004, p. 260; Hennig-Thurau et al., 2012; Liu, 2006).

Unter ökonomischen Gesichtspunkten ist vor allem der Preis eines medialen Angebots von Bedeutung und damit ausschlaggebend für den Erfolg (Blömeke et al., 2007; Clement, 2004; Elliott & Simmons, 2008, p. 108; Habann et al., 2008a; Kim, 2009; Rademacher & Siegert, 2007). Damit stehen Marketing und Werbung als weitere Erfolgsfaktoren in engem Zusammenhang (Blömeke et al., 2007; Clement, 2004; Elliott & Simmons, 2008, p. 108; Förster, 2011; Hennig-Thurau, Houston, & Sridhar, 2006; Hennig-Thurau et al., 2012, p. 271; Schönbach, 2004; Schönbach et al., 1997). Ebenso sind das Produktionsstudio beziehungsweise der Sender von Bedeutung für den Erfolg eines medialen Angebots (Elliott & Simmons, 2008, p. 108; Feddersen & Rott, 2011; Meiseberg & Ehrmann, 2008; Reinstein & Snyder, 2005). Da unter anderem die Strategie und Ressourcen des Distributors den Markteintritt wesentlich beeinflussen, stellt der Vertrieb einen Erfolgsfaktor dar (Blömeke et al., 2007; Clement, 2004; Meiseberg & Ehrmann, 2008; Simonton, 2009, p. 413).

Unter ökonomische Kreativität fällt aber auch das Erzielen und Nutzen von Grössenvorteilen. Synergien stellen beispielsweise bei neuen Magazinen einen Erfolgsfaktor dar (Bleis, 1996, p. 291). Dies gilt auch für die Grösse des Verlages (Tschörtner, 2008, p. 347). Cross-Selling ist bei Büchern wichtig (Blömeke et al., 2007, p. 437). Diversifikation und das Anzapfen verschiedener Erlösströme sind ebenso relevant für den Erfolg medialer Angebote (Clement, 2004; Dal Zotto, Dichamp, & Sommer, 2012; Lubbers & Adams, 2004; Wirtz & Ullrich, 2009). Positiven Einfluss auf den Erfolg hat auch das eingesetzte Budget, was sich etwa im Film-Bereich zeigt (Chang & Ki, 2005; Christensen et al., 2008, p. 76; Elliott & Simmons, 2008; Hennig-Thurau et al., 2009, p. 174; Joshi & Mao, 2012, p. 565; Lampel & Shamsie, 2000; Lee, 2009; Meiseberg & Ehrmann, 2008; Simonton, 2009, pp. 407–408). Entscheidend für den Erfolg eines Filmes ist zudem die Anzahl der Kinos beziehungsweise Leinwände auf denen er gezeigt wird (Boatwright et al., 2007; Chang & Ki, 2005; Christensen et al., 2008; Clement, 2004, p. 257; Elliott & Simmons, 2008; Gemser et al., 2007; Hennig-Thurau et al., 2009, p. 174; Hennig-Thurau et al., 2012, p. 271; Joshi & Mao, 2012, p. 565; Lampel & Shamsie, 2000; Liu, 2006; Reinstein & Snyder, 2005; Simonton, 2009, p. 413; Zuckerman & Kim, 2003). Besondere Bedeutung hat auch die für Werbung zur

Verfügung stehende Summe (Clement et al., 2007; Simonton, 2009, p. 413). Ebenso ist die finanzielle Performance im Allgemeinen ein Erfolgsfaktor (Simonton, 2009, pp. 404–405).

Insgesamt muss jedoch berücksichtigt werden, dass je nach Phase im Produktlebenszyklus weitere beziehungsweise andere Erfolgsfaktoren gelten, wie sich etwa für gebundene und Taschenbuch-Ausgaben von Büchern zeigt (Schmidt-Stölting et al., 2011). Unterschiede lassen sich auch für die verschiedenen Verwertungsstufen in der Filmindustrie nachweisen (Hennig-Thurau, Houston, & Walsh, 2006).

4 Bewertung der bisherigen Forschung

4.1 Erfolgsmaßstab

Erfolg ist im Medienkontext wegen des Doppelcharakters als Wirtschafts- und Kulturgut grundsätzlich keine eindeutige Größe. Es kann zwischen ökonomischem und kulturell-publizistischem Erfolg unterschieden werden. Ersterer bildet den unmittelbaren Erfolg für das Medienunternehmen, letzterer ergibt sich aus den externen Effekten des Medienangebots. Aber selbst bei einer rein ökonomischen Betrachtung ergeben sich unterschiedliche Maßstäbe, je nachdem, ob das Ergebnis in Bezug zu den Produktionskosten gesetzt wird (Gewinn) oder nicht (Umsatz). Bei werbefinanzierten Medien stellt sich die Frage, inwieweit der Erfolg auf dem Rezipientenmarkt in Erfolg auf dem Werbemarkt umgesetzt werden kann. Je nach „Wert“ der erreichten Publika kann auch eine große Zahl von Rezipienten gegebenenfalls wenig Werbeumsatz bringen.

Weiter kann Erfolg interorganisational anders bewertet werden als nach außen – etwa wenn Medienschaffende mehr Wert auf Anerkennung durch Peers legen als auf die verkaufte Auflage, oder wenn in der Binnenperspektive die Etablierung eines Projektnetzwerks als Nebeneffekt den Misserfolg eines Projekts kompensiert. Hier zeigt sich auch die temporäre Komponente von Erfolg. Ein Projekt, das auf der ersten Auswertungsstufe monetär nicht rentabel ist, kann sich später als nützlich erweisen,

Bewertung der bisherigen Forschung

Tabelle 1: Studien-Überblick Film (Auswahl)

Studie	Gattung	Was wurde untersucht?	Erfolgsmaß	Güte	Daten	Methodik
Lampel/Shamsie 2000	Film	Produktionsbudget (25,81), Kritiken (15,98), Anzahl Leinwände (2,91), Grösse des Studios, Jahr der Veröffentlichung	Box office (4 weitere Modelle; Laufzeit)	$R^2=0,49$	409 Filme (1991-1992), Variety, US	Sekundärdaten-analyse, Regressions-analyse
Zuckerman/Kim 2003	Film	Independent Klassifizierung (-8,37), Genre (Crime -0,91), Durchschnitt Kritik (0,85), Anzahl Leinwände (0,58), Anzahl Kritiken (0,07), Genre (Kinder, Romantik), Star-Power	Box office (4 weitere Modelle, Penetration)	$R^2=0,84$	396 Filme (1997), Baseline, Weekly Variety, US	Sekundärdaten-analyse, Regressions-analyse
Chang/Ki 2005	Film	Bewertung Kritiker (34,24), Fortsetzung (32,98), MPAA-Rating (PG 18,57), Genre (Drama -13,36), Bewertung Publikum (12,63), Release (Summer 11,86), Release (Easter 11,50), MPAA-Rating (R -9,54), Budget (0,74), Schauspieler (-0,34), Anzahl Leinwände (0,01), Distributor	Box office (Startwoche, Laufzeit)	Adjusted $R^2=0,59$	436 Filme (2000-2002), Internet Movie Database, US	Sekundärdaten-analyse, Regressions-analyse
Desai/Basuroy 2005	Film	Genre Vertrautheit (s), Wertigkeit Kritiken (s), Star-Power (s)	Box office Inland, Umsatz Video	-	175 Filme (1991-1993), 100 Filme (1999-2000), Variety, Baseline Services, Internet Movie Database, US	Sekundärdaten-analyse, ANOVA
Reinstein/Snyder 2005	Film	Genre (5,17), Produzent (4,38), Monat der Veröffentlichung (4,08), Jahr der Veröffentlichung (3,68), Anzahl Leinwände (1,22), Positive Bewertung durch Maltin (0,26), Positive Bewertung durch zwei Kritiker (0,25), Positive Bewertung durch einen Kritiker (0,15), Veröffentlichungswochenende (0,13)	Box office Startwochenende (Weitere Modelle, beispielsweise für Drama)	$R^2=0,78$	609 Filme, Box Office Guru, Siskel & Ebert Website, Leonard Maltin's book of reviews, US	Sekundärdaten-analyse, Regressions-analyse
Liu 2006	Film	Anzahl Kritiken (0,76), Anteil positiver Kritiken (0,70), Anzahl Word-of-Mouth Nachrichten (0,59), Anzahl Leinwände Startwoche (0,57), Anteil positiver WOM, Anteil negativer WOM, Anzahl neuer Filme in Top 20 der Woche, Durchschnittsalter Top 20 Filme	Box office Startwoche (7 weitere Wochen; Word of Mouth)	Adjusted $R^2=0,90$	40 Filme (2002), Yahoo! Movies, Variety, The Numbers, Internet Movie Database, Premier, US	Sekundärdaten-analyse, Regressions-analyse
Boatwright et al. 2007	Film	Anzahl Leinwände (s), MPAA-Rating (s), Attraktivität des Films (s), Budget, Werbung, Auszeichnung, Sequel	Box Office Startwoche & Sales Abfall (Marktpotenzial, Word-of-Mouth)	-	466 Filme (1997-2001), Variety, US	Sekundärdaten-analyse, Data Mining (SSVS)
Gemser et al. 2007	Film	Anzahl Leinwände (0,45), Umfang Kritiken (0,31), Star-Power, Distributor, Veröffentlichungsdatum, Aufbau auf bisherige Arbeit, Budget, Tonus Kritiken, Art des Films (+Interaktionseffekte)	Box office (Startwochenende)	Adjusted $R^2=0,97$	84 Filme (1998-2003), Internet Movie Database, denederlandse-spezifisch, nfd, NL	Sekundärdaten-analyse, ANOVA, Regressions-analyse
Christensen et al. 2008	Film	MPAA-Rating (0,41), Sequel (-1,44), Umsatz pro Leinwand (0,11), Kritiken (0,10), Budget (0,03), Ranking des Films, Regisseur, Schauspieler, Marktanteil, Saison, Timing	Oscar-Nominierungen (diverse Modelle)	McFaddens $R^2=0,40$	692 Filme (2001-2005), Variety, Internet Movie Database, Box Office Mijo, MPAA, Metacritic, US	Sekundärdaten-analyse, Regressions-analyse

Anm.: In der Spalte "Was wurde untersucht?" geben Werte in Klammern die Effektstärke signifikanter Faktoren an. "(s)" steht für einen signifikanten Faktor, ohne Aussage über den Effekt. In der Spalte "Erfolgsmaß" wird in Klammern auf weitere Modelle und weitere Erfolgsmaße in der Studie hingewiesen.

Bewertung der bisherigen Forschung

Fortsetzung Tabelle 1: Studien-Überblick Film (Auswahl)

Studie	Gattung	Was wurde untersucht?	Erfolgsmaß	Güte	Daten	Methodik
Elliott/Simmons 2008	Film	Anzahl Leinwände (s), Werbung (s), Kritiken (s), Budget (s), Star-Power (s), Preis (s), Fortsetzung (s), Genre (s), Veröffentlichungsdatum (s), Studio (s), Regisseur, Neuverfilmung, TV-Sendung, Season	Box office	-	527 Filme (1999-2003), Internet Movie Database, Nielsen ADC, The Guardian, UK	Sekundärdaten-analyse, Strukturmodell
Meiseberg/Ehrmann 2008	Film	Bekannte Idee (0,38), Auszeichnungen (0,30), Genre (Entertainment 0,24), Kritiker Empfehlung (0,20), Budget (0,20), TV-Finanzierung (0,20), Umsatz Distribution (0,19), Konkurrenz (0,15), Network (vertex degree 0,15), Schauspieler, Network (structural holes), Konkurrenz Raubkopien, Konkurrenz Filmpimporte, Genre (Dokumentation)	Anzahl Eintritte (2 weitere Modelle)	Adjusted R ² =0,48	160 Filme (1990-2004), FFA, DE	Sekundärdaten-analyse, Regressions-analyse
Hennig-Thurau et al. 2009	Film	Anzahl Kinos Startwochenende (0,79), Budget (0,25), Rating (0,17), Veröffentlichungsjahr (-0,15), Sequel (0,06), Star-Power, Kulturelle Vertrautheit, Genre (+Interaktionseffekte)	Umsatz Kino, Home-Video-Verkauf und Verleih	Adjusted R ² =0,70	Internet Movie Database, Variety, North America, DE	Sekundärdaten-analyse, Regressions-analyse
Kim 2009	Film	Preis Substitute (-0,67), Durchschnittlicher Eintrittspreis Kultureinrichtungen (0,51), Anzahl einheimischer Produktionen (0,16), Durchschnittlicher Importpreis ausländischer Filme (0,13), Einführung Kabel (0,11), Anzahl Importe (0,10), Eintrittspreis, Einkommen, Durchschnittlicher Exportpreis Koreanischer Filme, registrierte TV-Sets	Kinobesuche pro Kopf (7 weitere Modelle; Angebot)	R ² =0,55	Filme (1963-2004), Handbook of Korean Cinema, Korea	Sekundärdaten-analyse, Regressions-analyse
Lee 2009	Film	Budget (0,44), Veröffentlichungsjahr (2003 -0,39), Nicht-Drama Oskar Nominierung (0,19), Veröffentlichungszeitraum zwischen USA/Asien (-0,01), Genre (Comedy, Adventure), Drama Oskar Nominierung, Veröffentlichungsjahr (2004, 2005, 2006, 2007)	Box office (Taiwan, S. Korea, Japan, Singapore, Malaysia, Thailand, Indonesia, Philippines)	Adjusted R ² =0,51	585 Filme (2002-2007) boxoffice mojo, Internet Movie Database, Hong Kong	Sekundärdaten-analyse, Regressions-analyse
Hennig-Thurau et al. 2012	Film	Werbung (0,63), Box office Filmstart (0,34), Bewertung des Films (0,22), Veröffentlichung in weniger als 500 Kinos (-0,20), Kritiker Beurteilung (0,14), Popular Buzz (0,102), Genre (Thriller 0,08), Genre (Drama -0,07), Sequel (0,07), Zielgruppe (Familie 0,06), R-Rating (-0,06), Anzahl Kritiken (-0,05), Star (0,04), Genre (Romantik 0,04), Zielgruppe (Teenager 0,04), Zielgruppe (Paare 0,04), Varianz der Kritiken (0,02), Genre (Action, Comedy)	Box office (Startwochenende)	Adjusted R ² =0,90	1370 Filme (1998-2006), Metacritic, Yahoo! Movies, Internet Movie Database, North America	Sekundärdaten-analyse, Regressions-analyse
Joshi/Mao 2012	Film	Anzahl Leinwände (0,42), Budget (0,39), Sequel (0,22), Kritiken (0,13), Veröffentlichungszeitpunkt (0,11), Buch (0,11), Star, Rating (PG, R), Genre.	Box office (Startwochenende, Unterscheidung nach Buchbezug)	Adjusted R ² =0,59	482 Filme (1973-2007), thenumber.com, Internet Movie Database, US	Sekundärdaten-analyse, Regressions-analyse

Anm.: In der Spalte "Was wurde untersucht?" geben Werte in Klammern die Effektstärke signifikanter Faktoren an. "(s)" steht für einen signifikanten Faktor, ohne Aussage über den Effekt. In der Spalte "Erfolgsmaß" wird in Klammern auf weitere Modelle und weitere Erfolgsmaße in der Studie hingewiesen.

Bewertung der bisherigen Forschung

Tabelle 2: Studien-Überblick TV (Auswahl)

Studie	Gattung	Was wurde untersucht?	Erfolgsmaß	Güte	Daten	Methodik
Shamsie et al. 2006	TV-Sendungen	Konkurrenzsituation Network (-0,34), Ähnlichkeit konkurrierender Shows (-0,28), Bewertung der vorangegangenen Show (0,24), Alter der Show (0,17), time slot, Ähnlichkeit vorangegangener Show	Zuschauerzahl	-	25 Sendungen 1999-2000, Variety, US	Sekundärdaten-analyse, Regressions-analyse
Cummins/Chambers 2011	TV-Sendungen	Production Value von Nachrichtenbeiträgen (s), Altersgruppe (s)	Wahrgenommene technische Qualität (Glaubwürdigkeit, ökonomischer Wert)	-	154 Studenten und Erwachsene, US	Experiment, ANCOVA two factor analysis of covariance
Feddersen/Rott 2011	TV-Sendungen	Art der Begegnung (WC Finale 19,26; EURO Finale 16,57; WC 1/2-Finale 15,73; EURO 1/2-Finale 15,54; EURO 1/4-Finale 14,84; WC 1/4-Finale 12,72; WC 1/16-Finale 12,14; WC Gruppe 10,34; EURO Gruppe 10,32; Confed 1999 -2,85; WC Quali 2,78; EURO Quali 2,56; Confed 2005 2,52), Sendezeit (Prime Time 3,67; Access Prime Time 2,84), TV-Sender (RTL -2,80; SAT 1 -2,09), Gegner (Top 1,64; FIFA Ranking -0,01), Heimspiel (0,55), Wetter (Wind 0,45; Regen 0,18), Stars (0,03), Trainer (Ribbeck, Völler, Klinsmann, Löw), letzte Ergebnisse, Wochenende, Sender (ZDF), Jahreszeit, Wetter (Sonne), Ferienzeit	Zuschauerzahl (insgesamt 3 Modelle)	Adjusted R ² = 0,90	216 Fussball-Übertragungen (1993-2008), GfK, DE	Sekundärdaten-analyse, Regressions-analyse
Wolf 2006	TV-Sender	Wettbewerbsposition (0,47); Programmangebot, Image & Crossmedia (0,39); Qualität der Unterhaltung & Pay-TV (0,35); Personalmanagement (0,25); Zielgruppendifferenzierung (-0,19); Zusatzlösungen; Strategische Planung & Management; Innovationsmanagement; Diversifikation; Teleshopping; Partnerschaften; Beschaffung; Vertrieb & Distribution; Produktion; Finanz- & Kostenmanagement; Ressourcenmanagement; Informationsmanagement	Free-TV-national Marktanteil in der Zielgruppe (Rezipienten-Wert, Werbekundenwert, Ertragswert, Qualität; alle Modelle für Free-TV-regional)	R ² = 0,65	171 Führungskräfte, DE	Befragung, Regressions-analyse
Chang/Chan-Olmsted 2010	TV-Sender	Wahrgenommener Fit (0,33), Einstellung gegenüber der Dachmarke (0,16), Anzahl wahrgenommener Untermarken (-0,14), Qualitätsunterschiede im Portfolio der Dachmarke (0,14), Innovationsoffenheit der Rezipienten (0,12), Vertrautheit der Dachmarke, Channel Repertoire	Einstellung gegenüber der Marken-erweiterung	R ² = 0,36	301 Personen, US	Befragung, Regressions-analyse

Anm.: In der Spalte "Was wurde untersucht?" geben Werte in Klammern die Effektstärke signifikanter Faktoren an. "(s)" steht für einen signifikanten Faktor, ohne Aussage über den Effekt. In der Spalte "Erfolgsmaß" wird in Klammern auf weitere Modelle und weitere Erfolgsmaße in der Studie hingewiesen.

Bewertung der bisherigen Forschung

Tabelle 3: Studien-Überblick Buch, Zeitung, Magazin (Auswahl)

Studie	Gattung	Was wurde untersucht?	Erfolgsmaß	Güte	Daten	Methodik
Clement et al. 2007	Buch	Länge (0,55), Star-Power des Autors (0,19), Marketing Ressourcen des Verlags (0,01), Darstellung des Buchs in TV-Show, Buch-Kritik, Meinungsunterschiede zum Buch, Auszeichnungen, Lizenz eines Buchs aus dem Ausland, Sequel, Genre, Filmbezug, Preis pro Seite	Reihung auf Bestseller-Listen (4 Buchsegmente nach Erfolg)	$R^2=0,10$	1431 Bücher, Bestseller-Listen; 168 Bücher (1988-2001), Das Literarische Quartett, DE	Inhaltsanalyse, Mixture Regression Model
Schönbach/Lauf 2002	Zeitung	Lesefreundlichkeit (1985/89 -0,52; Anstieg -0,45), Visualisierungen Fotos & Illustrationen (Anstieg 0,45), Community Orientierung (1985/89, Anstieg), Anzahl Artikel (1985/89, Anstieg), Visualisierungen Fotos & Illustrationen (1985/89), Visualisierungen Icons (1985/89, Anstieg), Verständlichkeit der Struktur (1985/89, Anstieg)	Reichweite (Deutschland)	$R^2=0,30$	50 Zeitungen (1985-1995), US	Sekundärdaten einer Inhaltsanalyse, Regressionsanalyse
Habann et al. 2008	Zeitung	Muttermarkenstärke (s), Preisbeurteilung (s), Produktfit (s), Markenimagefit (s), Imagestruktur (s), Einstellung zu Erweiterungsprodukt (s) Imagestruktur, Muttermarkenerfahrung, Produktinvolvement	Zukünftige Kaufabsicht	$R^2=0,36$	174 studentische Probanden, DE	Befragung, Strukturgleichungsmodell
Bleis 1996	Magazin	Bedürfnisbefriedigung der Leser (s), Attraktivität für Inserenten (s), Neuartigkeit (s), Stimmigkeit (s), redaktionelle Qualität (s), Fit mit Verlagsprogramm (s), Mitarbeitermotivation (s), fachliche Fähigkeiten der Mitarbeiter (s), Unterstützung durch Unternehmensspitze (s), Existenz Fachpromotor (s), Existenz Machtpromotor (s), Markteintrittszeitpunkt (Konkurrenz) (s), Synergiepotentiale (s), Abdeckung der Leserbedürfnisse (s), Abdeckung der Inserentenbedürfnisse (s), Copy-Preis, TKP, Veränderung der Zeitschrift, Kenntnis des Marktsegments, Markteinführungsaufwand, Redaktionsmarketing, Markteintrittszeitpunkt (Saison), Bedeutung für den Verlag, standing des Verlags im Inseratenmarkt, Wettbewerbsdruck	Zielerreichung	-	82 Verlagsleiter, DE	Befragung, Korrelationsrechnung, Varianzanalyse, Diskriminanzanalyse
Tschörtlner 2008	Magazin	Wettbewerbsintensität auf dem Anzeigenmarkt (s), Wettbewerbsintensität auf dem Rezipientenmarkt (s), Alter des Verlagsleiters (s), Studium des Verlagsleiters (s), beruflich soziale Einbettung (s), strukturelle Ähnlichkeit zu anderen Verlagsleitern (s), Gründungsjahr (s), Verlagsgröße (s), Zahl der Neueinführungen (insgesamt) (s), Erscheinungshäufigkeit	Existenz/Nicht-Existenz im dritten Jahr nach Markteinführung	-	180 Lebensläufe von Verlagsleitern, DE	Inhaltsanalyse, Gruppenvergleich, Diskriminanzanalyse
Habann 2010	Print & TV	Entrepreneurship (s), Innovationsbezogene Umweltüberwachung (s), Ausmass der Rezipientenintegration (s), Einfluss des Projektleiters (s), Produktakzeptanz bei Werbekunden (s), Multimedialität der Produktarchitektur (s), Innovationsorientierte Unternehmenskultur, Projektübergreifendes Wissensmanagement, Unterstützung durch die Unternehmensleitung, Motivationsbedingungen, Aktiviertes Innovationspotenzial, Teaminterdisziplinarität, Bereichsübergreifende Kooperationsintensität, Promotoreinfluss, Originalität der Ideenherkunft, Angemessenheit des Markteinführungszeitpunkts, Justierungintensität nach Markteinführung, Produktüberlegenheit für Rezipienten, Marktsynergie, Redaktionelle Synergie	Innovationserfolg (Ökonomischer Innovationserfolg und Transferinnovationserfolg)	$R^2=0,68$	131 Personen Geschäftsführer, AT, CH, DE	Befragung, Strukturgleichungsmodell

Anm.: In der Spalte "Was wurde untersucht?" geben Werte in Klammern die Effektstärke signifikanter Faktoren an. "(s)" steht für einen signifikanten Faktor, ohne Aussage über den Effekt. In der Spalte "Erfolgsmaß" wird in Klammern auf weitere Modelle und weitere Erfolgsmaße in der Studie hingewiesen.

sei es weil die Nachfragestruktur auf nachgelagerten Märkten eine andere ist, oder weil es als Lockvogelangebot den Umsatz mit anderen Angeboten fördert.

Die bisherige Forschung fokussiert eindeutig auf den ökonomischen Erfolg und hier in der Regel auf Umsatz (bei Medien die direkt durch Rezipienten finanziert werden) oder die Rezipientennachfrage (bei werbefinanzierten Medien). Der Grund dürfte einerseits darin liegen, dass die Studien zum Großteil im Kontext der Management- und Marketing-Forschung entstanden sind, zum anderen dürfte eine Rolle spielen, welche Daten für die Forschenden zugänglich sind. Insbesondere im Filmkontext sind Umsatzdaten frei verfügbar und mittlerweile selbst Thema der medialen Aufmerksamkeit (Hayes & Bing, 2004). Angaben zum Gewinn sind dagegen in der Regel nicht öffentlich und Forscher erhalten, wenn überhaupt, lediglich Informationen für einzelne Projekte, so dass sich keine allgemeinen Aussagen ableiten lassen.

Kulturell-publizistischer Erfolg lässt sich als externer Effekt weit schwieriger operationalisieren und messen. Entsprechend selten kommt dieser Erfolgsmaßstab in der Literatur vor. Eine Ausnahme bilden die Studien, die sich mit den Voraussetzungen für einen Erfolg bei Preisverleihungen beschäftigen. Allerdings steht auch hier meist die Frage im Hintergrund, wie man die gewonnene Auszeichnung kommerziell nutzen kann.

Erfolg, so lässt sich festhalten, wird von der Forschung bisher allein auf die ökonomische Funktion der Medien bezogen, ohne jedoch Aussagen über den in dieser Perspektive letztlich relevanten Maßstab Rendite machen zu können. Aus Mangel an Daten reproduziert die Forschung zu Erfolgsfaktoren der Medien damit die Faszination der Medien für Bestsellerlisten und Star Rankings.

4.2 Methodik und Sampling

Insgesamt zeigt sich, dass die meisten empirischen Untersuchungen eine enge Auswahl an möglichen Einflussfaktoren berücksichtigen und diese auf den Erfolg im Rezipientenmarkt regressieren. Probleme der Multikollinearität – also dass die einzelnen Einflussfaktoren zum Teil stark miteinander korrelieren – werden häufig nicht thematisiert oder nicht befriedigend gelöst. Gleiches gilt für Interaktionseffekte zwischen den Einflussvariablen.

Welche Faktoren als signifikante Einflüsse auf den Erfolg ermittelt werden, ergibt sich damit zum Teil schon durch die Auswahl und Operationalisierung der Variablen. Es bleibt unklar, ob dieselben Faktoren als relevant erkannt würden, wenn alle möglichen Einflussvariablen erhoben worden wären

und die Interaktionen kontrolliert würden. Weiter können vernachlässigte Variablen zu Endogenität und damit zu einer Verzerrung der Ergebnisse führen.

Vielfach werden Sekundärdaten analysiert, ebenso sind vereinzelt Inhaltsanalysen und Befragungen zu finden. Die Daten insbesondere für die zahlreichen Studien im Filmbereich stammen meist aus den USA, häufig werden das Fachblatt Variety und die Internet Movie Database (IMDB) als Quellen herangezogen. Andere Märkte werden weit weniger intensiv untersucht. Regelmäßig wird dabei auf die x erfolgreichsten Filme aus einem bestimmten Zeitraum Bezug genommen. Eine solche Selektion spiegelt sich in den Ergebnissen wider, denn es wird jeweils nur ein spezifischer Ausschnitt aus der Grundgesamtheit ausgewählt. Somit besteht die Gefahr, dass Heterogenität in der Grundgesamtheit unbeobachtet bleibt.

4.3 Forschungsdefizite

Aus den vorliegenden Studien lässt sich keine Verallgemeinerung der gefundenen Erfolgsfaktoren ableiten, weder über Markt-, noch über Gattungsgrenzen hinweg. Jeweils unterschiedliche Operationalisierungen machen selbst Vergleiche zwischen Studien innerhalb desselben Marktes und derselben Mediengattung schwierig. Die vorgestellte Systematisierung sollte somit nicht als handlungsleitend für Medienmanager verstanden werden, wonach sich Erfolg einstellt, wenn nur alle Faktoren bedient würden. Vielmehr stellt sie eine Übersicht dar, welche Faktoren untersucht werden und in bestimmten Kontexten einen Einfluss auf den Erfolg gezeigt haben. Eine Addition der Faktoren im Sinne von mehr Faktoren im Projekt führen zu mehr Erfolg ist nicht zulässig. Ebenso wenig können Substitutionsbeziehungen unterstellt werden, wonach ein Faktor zum Beispiel in einer Prozessphase einen anderen in derselben Phase ersetzen könnte.

Obwohl die Bedeutung von Innovation vielfach betont (Kaye & Quinn, 2010, p. 14; van Weezel, 2010, pp. 47–49) und eine detaillierte Analyse des Prozesses explizit gefordert wird (Mueller-Oerlinghausen & Sauder, 2003, p. 36; Schnell, 2008, p. 486), gibt es weder in der klassischen Erfolgsfaktorenforschung, noch in der Medienmanagementliteratur belastbare Anhaltspunkte wie Entwicklungsprozesse konkret ausgestaltet werden sollen (Köhler, 2005, p. 75). Um einen Analogie aus der Gastronomie zu bemühen: Die Erfolgsfaktorenforschung beschäftigt sich mit den Zutaten und der Qualifikation des Kochs, lässt aber weitgehend unberücksichtigt was in der Küche konkret vor sich geht.

5 Forschungsbedarf

Obschon eine Vielzahl an Studien zu Erfolgsfaktoren vorliegt, fehlt es an einer Integration der Ergebnisse. Welche der jeweils gefundenen Faktoren gelten universell, also auch für andere Mediengattungen oder in anderen Märkten, welche müssen als singuläre Spezifika eines bestimmten Settings verstanden werden? In welchem Verhältnis stehen die Erfolgsfaktoren zu einander? Können Sie einander ersetzen oder etwa nur in Kombination wirken?

Um die Breite der Erfolgsfaktorenforschung nutzbar zu machen, bedarf es aufbauend auf der hier vorgelegten Systematisierung vierer Schritte, die in der Folge mit Qualitative Comparative Analysis (QCA) verknüpft vorgestellt werden. Dabei handelt es sich um ein in der Sozialwissenschaft vergleichsweise neues Verfahren, das nicht als Allheilmittel präsentiert werden soll. Es geht vielmehr darum, die Möglichkeiten der im Medienmanagement noch kaum verbreiteten Methode und ihre Nützlichkeit im Kontext der Erfolgsfaktorenforschung aufzuzeigen.

- (1) Einfache Regressionsanalysen sind nicht geeignet, das Verhältnis der verschiedenen Faktoren zu einander zu klären. Mindestens müssen in zukünftigen Studien Interaktionseffekte berechnet werden. Besser noch wäre eine Applikation einer alternativen Methode. QCA böte sich an, um hinreichende und notwendige Bedingungen für den Erfolg zu differenzieren (Ragin, 1987, 2000, 2008). Auf Boolescher Algebra und Mengentheorie aufbauend, ist eine Bedingung (Faktor) „notwendig“, wenn das Outcome (Erfolg) eine Untermenge der Bedingung darstellt, beziehungsweise „hinreichend“, wenn die Bedingung eine Untermenge des Outcomes darstellt. Die Methode erlaubt standardisierte kausalanalytische Untersuchungen kleiner, mittlerer und grosser Fallzahlen, was für die Verallgemeinerbarkeit von Annahmen sowie die Replikation von Studien eine zentrale Bedeutung hat (Rihoux, 2006, p. 682). Dabei unterliegt die gleichzeitige Überprüfung mehrerer Bedingungen nicht der Multikollinearitätsproblematik, denn es handelt sich bei den Bedingungen nicht um rivalisierende Kausalfaktoren wie in korrelationalen Verfahren, sondern um die Zutaten komplexer Kausalbeziehungen (Ragin, 2003, p. 8; Schneider & Wagemann, 2007, pp. 78–79), was für die Erfolgsfaktorenforschung ideal ist. QCA erlaubt zudem, dass mehr als eine Kombination der Faktoren zum selben Outcome führt und kommt so dem Problem der Äquifinalität bei. Darüber hinaus liegt ein weiterer Vorteil im qualitativen Aspekt von QCA: In den Auswertungs- und Interpretationsschritten spielt das Fallwissen eine entscheidende Rolle, was Studien die nötige Kontextsensitivität verleiht. Auf die hervorragende Eignung der Methode für die strategische Managementforschung wird in der Literatur hingewiesen

(Greckhamer, Misangyi, Elms, & Lacey, 2007; Ketchen, Boyd, & Bergh, 2007, p. 653; Venkatraman, 2007, p. 792). In anderen Industrien wurde QCA auch bereits erfolgreich bei der Erforschung von Faktoren eingesetzt, die die Leistung eines Unternehmens positiv beeinflussen (Ordanini & Maglio, 2009; Vis et al., 2007, p. 537; Winand et al., 2011, p. 247). In diesem ersten Schritt könnte die Fokussierung auf Erfolg im Sinne der Rezipientennachfrage zunächst beibehalten werden, allerdings bietet es sich an, ein relatives Maß zu verwenden, das den durchschnittlichen Erfolg von Konkurrenzangeboten mitberücksichtigt.

- (2) In Zeiten von Konvergenz, Multi- und Crossmedia sind Studien, die sich nur auf eine – immer schwerer abgrenzbare – Mediengattung fokussieren, nicht mehr zeitgemäß. Das Medienmanagement braucht gattungsübergreifend anwendbare Faktoren, aber auch die Kommunikationswissenschaft hat ein Interesse an universellen Zusammenhängen. Zukünftige Studien sollten somit gattungsübergreifend angelegt sein, um so gemeinsame und gattungsspezifische Faktoren differenzieren zu können. Dieses Vorgehen wird einerseits zu generischen Faktoren führen, andererseits ließe sich eine Hierarchie der Faktoren bilden: Basisfaktoren, die unter allen Umständen in allen Kontexten notwendig sind, und solche, die je nach Kontext zusätzlich notwendig werden. In diesem Schritt muss der Erfolgsmaßstab insofern angepasst werden, als dass auch der Erfolg gattungsübergreifend erfasst wird. Die Rezipientennachfrage als Basis ist jedoch immer noch möglich. Dafür eignet sich QCA aufgrund der oben erläuterten Kontextsensitivität, die insbesondere für gattungsübergreifende Studien wichtig ist.
- (3) Wenn Erfolgsfaktoren gattungsübergreifend identifiziert sind, ist der nächste Schritt den Einfluss von weiteren Kontextfaktoren auf Ebene der Marktstruktur zu prüfen. Zunächst könnte man testen, inwieweit sich Ergebnisse aus einem Markt in einen anderen übertragen lassen. Letztlich ist auch hier wieder eine Hierarchie der Faktoren möglich, die immer gelten, und solche, die ihre Wirkung nur unter bestimmten Rahmenbedingungen entfalten. Hier liegt der bereits beschriebene Vorteil von QCA in der Standardisierung und der vergleichsweise einfachen Replikation von Studien.
- (4) Im vierten Schritt muss das Ziel sein, die unterschiedlichen Erfolgsmaßstäbe in Bezug zu setzen. Dabei kann Erfolg aus ökonomischer (meso), kultureller (makro) sowie aus individueller Perspektive der Medienschaffenden (mikro) unterschieden werden. QCA bietet die Möglichkeit mehrere Maßstäbe zu berücksichtigen (siehe zum Beispiel Vis et al., 2013). Zu prüfen wäre hier insbesondere wiederum die Interaktion zwischen den Erfolgsfaktoren, also

die Frage, ob sich zum Beispiel Bedingungen für den kulturellen und ökonomischen Erfolg ergänzen oder gegenseitig ausschließen.

Mit Hilfe dieser vier Schritte könnte der Forschungsaufwand, der bereits in die Erfolgsfaktorenforschung gesteckt wurde, besser nutzbar gemacht werden. Verallgemeinerungen werden möglich und sowohl Medienmanager als auch die Wissenschaft könnten die Prozesse der Medienentwicklung und Produktion besser verstehen und ihre Anstrengungen auf die als relevant identifizierten Bereiche fokussieren.

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Sommer & von Rimscha (2014): Die transmediale Angebotsmatrix

Jenseits von traditionellen Mediengattungen: Die transmediale Angebotsmatrix. In H. Rau (Ed.), *Digitale Dämmerung. Die Entmaterialisierung der Medienwirtschaft* (pp. 247–265). Baden-Baden: Nomos.

Abstract

Traditionell werden Medienangebote nach Gattungen eingeteilt. Das entscheidende Kriterium sind dabei die technischen Eigenschaften des materiellen Trägers der immateriellen Medieninhalte. In Zeiten der analogen Mediendistribution war diese Einteilung durchaus sinnvoll. Die Digitalisierung hat jedoch zu einer weitgehenden Entmaterialisierung geführt. Trägermedien werden immer weniger relevant und Produktionsprozesse nähern sich zusehends an. Vor diesem Hintergrund entwickelt dieser Beitrag eine erweiterbare Systematisierung von Medienangeboten mit den zwei Basisdimensionen Serialität und Inhalt.

1 Einleitung

Traditionell werden Medienangebote in Forschungsarbeiten zur Medienökonomie und zum Medienmanagement nach Mediengattungen eingeteilt. Das entscheidende Kriterium sind dabei die technischen Eigenschaften des materiellen Trägers der immateriellen Medieninhalte. Auch die meisten medienökonomischen Lehrbücher verwenden noch immer diese Systematik, in der die Eigenschaften der Mediengattungen diskutiert werden (z.B. Heinrich, 2010a, 2010b). In Zeiten der analogen Mediendistribution erwies sich diese Einteilung als durchaus sinnvoll, denn trotz Fixkostendegression waren die variablen Kosten je nach materiellem Träger durchaus erheblich und die Produktionsprozesse sehr unterschiedlich. Die jeweiligen Aufgaben und Strategien des Medienmanagements haben sich also gegebenenfalls tatsächlich entlang der Gattungsgrenzen unterschieden. Die Digitalisierung hat zu einer weitgehenden Entmaterialisierung der Medien geführt, Trägermedien werden immer weniger relevant (Henten & Tadayoni, 2008) und Produktionsprozesse nähern sich zusehends an (Wallace, 2013). Demensprechend wird das Internet – quer zu den klassischen Gattungen – oft als neues Medium dargestellt (z.B. Dahinden & Trappel, 2010). Medienmarken gewinnen in diesem Umfeld an Bedeutung. Vor dem Hintergrund geht dieser Beitrag der Frage nach, welche anderen Dimensionen sich für eine Systematisierung von Medienangeboten anbieten und schlägt eine erweiterbare Einteilung mit zwei Basisdimensionen vor.

Im Abschnitt „Problemstellung“ wird Literatur zur Einteilung in Mediengattungen aufgearbeitet. Darauf folgt eine detaillierte Betrachtung der Veränderungen durch Digitalisierung und Konvergenz, die auch anhand von Beispielen darstellt, warum dies nicht mehr zeitgemäß ist. Der Abschnitt „Lösungsvorschlag“ erläutert eine alternative Systematik, die den aktuellen Entwicklungen eher gerecht wird. Zum Abschluss werden im „Fazit“ mögliche Anknüpfungspunkte aufgezeigt.

2 Problemstellung

Mediale Angebote werden traditionell nach Gattungen unterschieden. Heinrich (Heinrich, 2010a, 2010b) geht auf Zeitung, Zeitschrift, Anzeigenblatt, Hörfunk und Fernsehen explizit ein und grenzt den Mediensektor durch Zeitungsverlage, Zeitschriftenverlage, Anzeigenblattverlage, Nachrichtenagenturen, Nachrichtenbüros, Pressebüros, Hörfunkveranstalter, Fernsehveranstalter und Programm-Input-Produzenten ab. Wirtz (2013) unterscheidet unter dem Titel „Medien- und Internetmanagement“ in Zeitung und Zeitschrift, Buch, Film, TV, Radio, Musik, Video- und Computerspiel sowie Internet. Dies wirft bereits die Frage auf, ob es sich bei letzterem nicht um ein

Medium handelt. Die Systematisierung ist auf Technik und Zeitbezug zurückzuführen: Buch (Druck, keine Periodizität), Zeitung (Druck, täglich), Zeitschrift (Druck, wöchentlich oder seltener), Film (Audiovision, keine Periodizität), Radio (Audiotechnik, mehrmals täglich), TV (Audiovision, mehrmals täglich) und Online-Medien (Computernetzwerke, stündlich bis mehrmals täglich) werden bei Dahinden und Trappel (2010) erläutert. Sie findet sich bei Zydorek (2013) in einer weiter ausdifferenzierten Form.

Implizit steckt in dieser Beschreibung der Charakteristika jedoch auch eine Funktionszuschreibung an die jeweiligen Medien und eine verengte Sicht auf das Medium. Wenn etwa beim Radio als Periodizität „mehrmals täglich“ angegeben wird, kann sich das nur auf die stündlichen Nachrichten beziehen. Die für die Hörer gegebenenfalls relevantere Musikfarbe wird gar nicht gewechselt und die einzelnen Titel, die gespielt werden, werden im Rhythmus von ein bis zwei Wochen in sogenannten Call-Outs beim Publikum getestet und eventuell ausgetauscht (Schramm & Knoll, 2012). Die Gattungssystematik interpretiert Radio also als Informationsmedium, das es für einen Großteil der Hörer nicht ist. Film steht ohnehin quer in dieser Systematik: Im Gegensatz zu den anderen Mediengattungen wird hier das Inhaltsformat statt der technischen Infrastruktur als Gattungsbegriff verwendet. Konsequenter müsste die Gattung hier also eigentlich Kino heißen, denn ein Film kann sowohl im Kino als auch im Fernsehen oder via DVD vertrieben werden. Auch hier kann man die Periodizität in Frage stellen, denn das Kino hat sehr wohl eine Periodizität, wenn wöchentlich ein Teil der gezeigten Filme ausgetauscht wird.

Trotz der genannten Einschränkungen erwies sich diese Einteilung bislang als nützlich, da sich Unternehmen auf ihren Kernbereich fokussierten, was aus ökonomischer Sicht mit sehr unterschiedlichen Kosten in Produktion und Distribution verbunden war. Das entspricht jedoch nicht mehr der Realität der Medienindustrie (Albarran, 2010). Grenzen verschwimmen zunehmend (McDowell, 2006). Unternehmen bündeln heute verschiedenste Angebote unter einem Dach, wie sich an einigen Beispielen zeigen lässt:

Die *Axel Springer AG* startete im Juni 2013 mit dem Bezahlmodell der *BILD* für journalistische Inhalte im Internet. Was ursprünglich als Zeitung gegründet wurde, bietet mittlerweile diverse Angebote über die Website an, darunter exklusive Videos zum deutschen Fußball (Axel Springer AG, 2013).

Gruner + Jahr kündigte im September 2013 die Transformation vom Zeitschriftenhaus in ein Inhaltehaus an. Künftig soll neben dem Printgeschäft verstärkt in Digitales investiert und das Produktportfolio des Unternehmens im Bereich Commerce und Paid Services ausgebaut werden (Gruner + Jahr AG, 2013).

Auch im Buchmarkt wird intensiv diversifiziert. Werke wie *Shades of Grey* sind nicht nur als Roman in gedruckter oder digitaler Form ein Bestseller, sondern schaffen eine Erzählwelt, die es ermöglicht weitere Angebote auf den Markt zu bringen. So gibt es neben Partyspielen und Erotikartikeln auch einen Soundtrack zum Buch.

Beim Film *Avatar* (2009) waren nicht nur Action Figuren erhältlich, sondern entstanden auch Computerspiele, die an die Handlung anknüpften.

Das Programm von Hörfunk-Anbieter wie der BBC kann man mittlerweile nicht nur am Radio verfolgen, sondern auch im Internet hören. Über die Website werden zudem zahlreiche weitere Inhalte angeboten, zu denen beispielsweise Blogs und Podcasts zählen (Albarran, 2010).

Fernsehsendungen wie *Deutschland sucht den Superstar* zeichnen sich durch vielfältige Angebote im Umfeld des Programms aus. Es wird nicht nur zu zahlreichen Gewinnspielen aufgerufen, sondern unter anderem ein eigenes Magazin zur Show und den Kandidaten herausgebracht.

Die genannten Beispiele gehen dabei über das klassische Lizenzgeschäft hinaus, insofern zusätzliche Inhalte für zusätzliche Kanäle generiert werden und nicht nur ein bekanntes Logo auf ein eigentlich verknüpft Produkt aufgebracht wird.

In mehreren Fallstudien wird bereits detaillierter aufgezeigt, welche Vielzahl an Gattungen ein Medienhaus abdeckt (siehe z. B. Albarran, 2010; Carvajal & García Avilés, 2008; Colapinto, 2010; Edge, 2011). Geht man nach der Ähnlichkeit der Angebote, ist demnach die auf Technik begründete Einteilung nicht mehr haltbar. In zunehmendem Maße wird von cross-, multi-, oder transmedialen Angeboten gesprochen. Caspar (2002) fokussierte in seiner Studie auf die Marke im Rahmen dieser Entwicklungen. Im fiktionalen Bereich etabliert sich mittlerweile zunehmend das Konzept des „transmedia storytelling“ (Scolari, 2009), bei dem eine Erzählwelt als Marke aufgebaut wird, die jeweils den Anforderungen unterschiedlicher Distributionswege angepasst werden kann. Das Produkt ist also nicht mehr ein Buch oder eine TV-Serie, sondern eine Marke beziehungsweise Erzählwelt. Dazu haben Digitalisierung und Konvergenz einen wesentlichen Beitrag geleistet.

3 Digitalisierung

Digitalisierung beschreibt den Prozess der Veränderungen, wenn entmaterialisierte binäre Informationseinheiten an die Stelle von analogen materiellen Einheiten treten (Küng, Picard, & Towse, 2008; Zerdick et al., 2001). Die Auswirkungen der Digitalisierung betreffen dabei die gesamte

ökonomische Struktur der Medienbranche (Seufert, 2004) und wurden in Bezug auf das Medienmanagement in der wissenschaftlichen Literatur behandelt (Loebbecke, 2006). Zur Erläuterung kann das Konzept der Wertschöpfungskette von Medienunternehmen herangezogen werden. Vereinfacht betrachtet folgen hier auf die Produktion zunächst die Bündelung, dann die Distribution.

In der Zeitungs- und Zeitschriftenbranche wird weitgehend digital produziert. Die Bündelung der einzelnen Texte und Bilder zu einer Ausgabe erfolgt ebenso digital. Bedrucktes Papier stellt jedoch nach wie vor die dominante Verbreitungsvariante der Inhalte dar. Auch im Radio erfolgt die Produktion meist digital, während über UKW gesendet wird. Im TV dagegen ist ebenso die Distribution größtenteils digitalisiert. Mittels Satellit und terrestrisch gibt es keine analoge Verbreitung mehr, auch im Kabel ist die digitale Verbreitung der Standard. Eine Mischform hat sich im Kino etabliert, da der Verleiher statt Filmrollen Festplatten zur Verfügung stellt, also Digitales auf einem materiellen Träger. Im Musikmarkt nimmt die Bedeutung von digitalen Download- oder Streaming-Angeboten kontinuierlich zu, digitalen Tonträgern bleibt in Zukunft vermutlich nur mehr ein Nischenmarkt ähnlich dem für analoge Vinylschallplatten.⁹ Der Buchmarkt hat der Digitalisierung am längsten getrotzt, doch selbst hier zeigen E-Books große Wachstumsraten und einzelne Genres wie zum Beispiel Enzyklopädien finden sich mittlerweile ausschließlich online (Kühn, 2013).

Während in der Produktion das Digitale bei allen Mediengattungen bereits länger etabliert ist, treffen die Veränderungen vor allem Bündelung und Distribution. Hier soll zwischen zwei Ebenen unterschieden werden: (1) Eine zumindest teilweise Digitalisierung der Distribution ist auch bei materiellen Produkten möglich, beispielsweise wenn ein gedrucktes Buch oder eine DVD in einem Online-Shop bestellt werden (Hess, 1999; Wirtz & Sammerl, 2006). (2) Die Digitalisierung des eigentlichen Produkts bedeutet dagegen eine Entmaterialisierung und ermöglicht es somit auch in der Distribution auf einen materiellen Träger zu verzichten und die Information direkt über digitale Kanäle zu verbreiten (Riehm, 2003). Das trifft beispielsweise auf das E-Book zu, das via Mobilfunknetz auf ein Tablet oder einen Reader geladen wird, aber auch auf den Pay-per-view-Film auf dem Smart-TV.

Die erste Ebene der Digitalisierung verändert die Marktstruktur vor allem durch ihren Einfluss auf das stationäre Geschäft mit Medienträgern. Klassische Geschäfte verlieren an Umsatz, Marktanteil und

⁹ Während in Deutschland noch immer 77% des Umsatzes mit Musik durch Aufnahmen mit physischen Tonträgern erzielt wird Bundesverband Musikindustrie (2014), sind es in stärker digitalisierten Märkten wie Schweden nur noch 23% Grammofonleverantörernas Förening (2014).

Bedeutung. Dies zeigt sich am Beispiel des traditionellen Buchhandels, der zunehmend Probleme bekommt (von Rimscha & Putzig, 2013). Daraus ergeben sich Möglichkeiten für neue Marktteilnehmer mit anderen Kompetenzen und Ressourcen. In diesem digitalen Umfeld sind Markteintrittsbarrieren mitunter niedriger, was Neueintritte begünstigt. Dominante Anbieter im Online-Versand wie etwa *Amazon* sind häufig erst mit der Digitalisierung in die Branche eingestiegen. Währenddessen haben alteingesessene Anbieter mit Anpassungsproblemen zu kämpfen. Mit der Digitalisierung im Vertrieb lassen sich Informationsasymmetrien reduzieren. Produkte, Leistungen und Preise können leichter verglichen werden, weshalb der Kunde gegenüber dem Verkäufer nicht mehr zwangsläufig schlechter informiert ist. Beispielsweise sind nur wenige Klicks nötig, um verschiedene Filme gegenüberzustellen.

Die zweite Ebene der Digitalisierung bezieht sich auf die Digitalisierung des Produkts oder der Dienstleistung selbst, was weitreichendere Konsequenzen nach sich zieht. Bei digitalen Produkten kann sich der Preis stärker an der Nachfrage als an den Produktionskosten orientieren. Bei gedruckten Büchern ist es etwa so, dass sie mit steigender Seitenzahl teurer werden (Papies, 2009). Es sind mehr Papier und Druckfarbe nötig. Auch der Versand wird teurer. Bei einem E-Book verändert sich dagegen lediglich die Größe der Datei, was auch beim Versand praktisch zu keinerlei Mehraufwand führt. Während die Fixkosten aus Autorenhonorar, Layout und Rechten unverändert bleiben, kann sich der Preis stärker an der erwarteten Nachfrage orientieren. Die Stückkosten hängen demnach eng mit der Absatzmenge zusammen, da die variablen Kosten bei digitalen Medien gegen Null tendieren. Daraus ergibt sich, dass hohe Preistransparenz und hohe Preissensibilität bei Medienprodukten die Preise insgesamt drücken und die Märkte für von Rezipienten finanzierte Medien volatiler werden. Einnahmen lassen sich weniger gut planen und Gewinne gehen potenziell zurück, was auf Anbieterseite zu stärkerer Kostenkontrolle und weniger Qualität führen kann.

Die Digitalisierung führt auch zu einer neuen Form des Wettbewerbs, jenem auf Plattform-Ebene. In der digitalen Welt kann der Kunde auf vielen verschiedenen Wegen erreicht werden, die sich häufig durch eine eigene technische Infrastruktur auszeichnen. Eine Zeitung lässt sich in digitaler Form nicht nur über das Internet vertreiben, sondern auch auf Tablets und Smartphones, die sich durch Betriebssysteme wie *iOS* oder *Android* auszeichnen. Auf Seiten der Anbieter von Inhalten ist es nötig für jede Infrastruktur entsprechende Anpassungen vorzunehmen sowie die Konditionen der Plattformbetreiber zu akzeptieren. Dies lässt die Kostenvorteile der Digitaltechnik geringer ausfallen. Rezipienten wiederum entsteht der Nachteil hoher Wechselkosten. Eine *iPhone*-App funktioniert auf anderen *iOS*-Geräten, nicht aber auf einem *Amazon Kindle*. Kunden sind dementsprechend stark an die ursprünglich gewählte Plattform gebunden (Hess & Anding, 2003).

Daran lässt sich erkennen, dass der Prozess der Digitalisierung in den unterschiedlichen Mediengattungen unterschiedlich weit fortgeschritten ist. Bei der Gegenüberstellung wird auch der Aspekt der Immaterialität augenscheinlich. Während Gattungen wie Radio oder TV schon immer ohne materiellen Träger auskommen mussten, bedeuten die aktuellen Entwicklungen „Neuland“ für den Print-Sektor. Wenn man nun Gattungen analog zur Biologie als Cluster verstehen will, deren Mitglieder sich untereinander ähnlicher sein müssen als den Mitgliedern irgendeines anderen Clusters, kann in einer digitalisierten Medienwelt die Technik nicht mehr entscheidend sein, da Digitaltechnik zu einer Konvergenz der Mediengattungen geführt hat. Jenkins (2004) argumentiert, dass Konvergenz jedoch breiter als nur technisch und ökonomisch verstanden werden müsse, nämlich auch in ihrer Auswirkung auf Inhalte und die Rezeption. Eine Systematisierung der Angebote sollte sich also auf Dimensionen beziehen, die einerseits technikneutral sind, und andererseits aus Sicht der Anbieter Relevanz haben. Wir schlagen vor diesem Hintergrund die Serialität und den Inhalt vor, was in der Folge näher erläutert wird.

4 Lösungsvorschlag

Wenn die Technik als Unterscheidungsmerkmal unbrauchbar ist, gilt es andere Kriterien zu finden. Dazu muss zunächst die Frage beantwortet werden wozu eine Systematisierung verwendet werden soll, denn eine Einteilung ist ja kein Selbstzweck: Wozu dienen Mediengattungen also aus medienökonomischer Perspektive?

Mediengattungen werden herangezogen um Analyseeinheiten zu definieren und können so als Grundlage für eine sachliche Marktabgrenzung (=relevanter Markt) in Wettbewerbsanalysen dienen. Mediengattungen sollten demnach einen mehr oder minder einheitlichen Bedarfsmarkt beschreiben, auf dem die verschiedenen Angebote substituierbar sind. Genau diese Substituierbarkeit muss angesichts der Konvergenz sowohl der Technik als auch der Nutzung neu bewertet werden. Dies lässt sich beispielhaft an der Auseinandersetzung zwischen Verlegern und öffentlich-rechtlichen Rundfunkanstalten aufzeigen. Ursprünglich unterschiedliche Mediengattungen stehen plötzlich über ihre Websites und Apps in direkter Konkurrenz zueinander. Unser Vorschlag ist es daher, bei den für Mediengüter zentralen Charakteristika Serialität und Inhalt anzusetzen und zu differenzieren, wie diese jeweils ausgeprägt sind. Gleiche Ausprägung bedeutet von der Technik unabhängige Ähnlichkeit und damit potentielle Substituierbarkeit.

In puncto *Serialität* werden periodische und nicht-periodische Medien unterschieden (Dahinden & Trappel, 2010). Unabhängig von technisch definierten Mediengattungen bestimmt die Frage nach der Serialität die Produktion der Angebote. TV-Programme sind ‚durchgestrippt‘ mit immer gleichen Serien auf immer gleichem Sendeplatz. Zeitungen bieten Reportageserien, Nachrichtenredaktionen nutzen den Nachrichtenwert Kontinuität, Filme und Computerspiele kommen kaum noch ohne Zahl im Titel aus und die Bestsellerlisten werden von Romanserien wie Donna Leons *Commissario Brunetti*, *Harry Potter* oder *The Girl With The Dragon Tattoo* dominiert. Dies ist auf eine zentrale Eigenschaft zurückzuführen, die bei allen Angeboten gleichermaßen zum Tragen kommt: Die meisten Medien sind Erfahrungsgüter, Erwartungstreue ist entscheidend. Ein Gutteil der Medienmanagementforschung der vergangenen Jahrzehnte hat sich mit der Frage beschäftigt, wie die Erfahrungsguteigenschaft von Medien reduziert werden kann und wie sich ein Match zwischen Erwartungen und Angebot herstellen lässt, der dann gegebenenfalls auch in einer ex ante Zahlungsbereitschaft mündet. Neben der Standardisierung der Angebote (Formate, Genre, etc.) spielt hier die Serialität eine wichtige Rolle (z. B. (Friedrichsen & Brunner, 2007; Moran & Malbon, 2006; Schönbach, 1997; von Rimscha, 2010).

Eine *inhaltliche* Systematisierung zeigt auf, welche Ressourcen auf Produktionsseite nötig sind und welche Bedürfnisse auf Nutzerseite befriedigt werden müssen. Dies kann beispielsweise beim Film über das Genre erfolgen. Eine allgemein akzeptierte Genresystematik fehlt jedoch. Die zahlreichen Genreeinteilungen die sich in der Literatur finden, sind weder abschließend noch trennscharf (Geraghty & Jancovich, 2008; Silverblatt, 2007). Meist werden mehrere Dimensionen vermischt: Beim Genre „Animation“ ist etwa die Produktionstechnik bestimmend, bei „Romantic Comedy“ sind es Plotelemente. Genres sind damit hilfreich, eine Gruppe von Angeboten zusammenzufassen, die eine Eigenschaft gemeinsam haben, sie eignen sich jedoch nicht dazu, das gesamte Medienangebot zu strukturieren. Inhaltsanalytische Operationalisierungen, wie sie etwa von Weiß und Trebbe (2000) in der Programmstrukturanalyse des deutschen Fernsehens vorgeschlagen wurden, sind in diesem Kontext auch nur bedingt nützlich. Die Einteilung ist sehr kleinteilig, und auf das Fernsehen fokussiert.

Eine Möglichkeit mit diesem Problem umzugehen ist die Aggregation. Die Unterscheidung von Non-Fiction versus Fiction wäre eine Möglichkeit dem zu begegnen, eignet sich aber insofern nicht, als dass das Begriffspaar nicht als Endpunkte eines Kontinuums gesehen werden kann. Dies lässt sich besser in der Unterscheidung in Information versus Unterhaltung erreichen. Diese Variante ist zudem passend, da sie unabhängig vom materiellen Träger und klassischen Mediengattungen funktioniert. Wichtig hierbei zu erwähnen: Wir verstehen Information und Unterhaltung als Angebots- nicht als Nachfragekategorien. Es geht uns nicht darum ob sich jemand bei der Nachrichtenrezeption

unterhalten fühlt, sondern darum was die Anbieter intendieren. Gleichwohl kann man annehmen, dass auch ein Zuschauer, der sich durch die Krawatte des Nachrichtensprechers unterhalten fühlt, die Nachrichtensendung nicht unbedingt als Substitut für einen Fernsehfilm ansieht. Ebenso werden ein primäres Interesse an kommerzieller Verwertung vorausgesetzt und Angebote ausgeklammert, die weder informieren noch unterhalten wollen, also in erster Linie künstlerischer Natur sind.

Digitalisierung und Konvergenz haben eine Einteilung von Medienangeboten nach der technischen Basis des Trägermediums unbrauchbar gemacht. Wenn mittlerweile als Letztes selbst der Buchmarkt digitalisiert wird, ist es an der Zeit, eine neue Systematisierung zu etablieren. Wir schlagen dabei als Basisdimensionen eine grobe Einteilung nach Inhalt und Serialität vor, da so eine Matrix aus Angeboten resultiert (siehe Abbildung 1), die sich in Bezug auf diese Eigenschaften ähneln, unabhängig vom technischen Übertragungsweg.

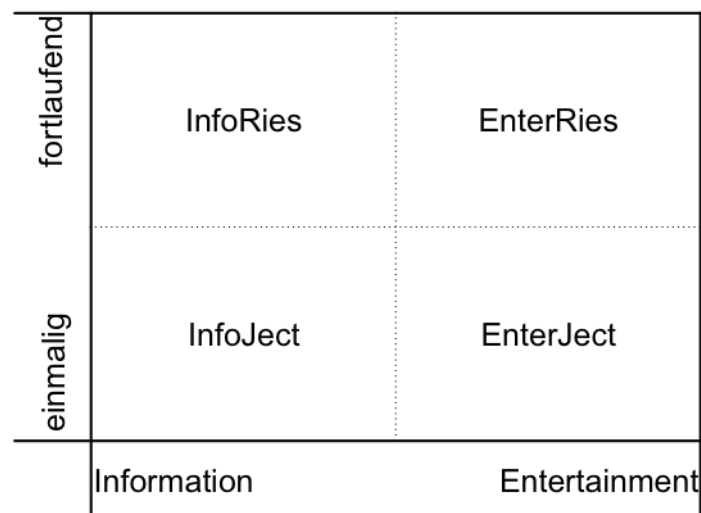


Abbildung 1: Unterscheidung medialer Angebote nach Serialität und Inhalt

- EnterJect: „EnterJect“ beschreibt eine Mischung aus Entertainment und Project, also abgeschlossene Angebote, die einmalig produziert werden und das Publikum in erster Linie unterhalten wollen. Einen Start- und Endpunkt im Entwicklungsprozess gibt es bei Angeboten wie Romanen oder Spielfilmen.
- EnterRies: Unter „EnterRies“ lässt sich die Kombination aus Entertainment und Series zusammenfassen. Dies ist ebenso auf Unterhaltung ausgerichtet, aber fortlaufend produziert.

Dazu zählen beispielsweise Magazine, TV-Serien oder Shows sowie die dazugehörigen Websites der Anbieter.

- InfoRies: Bei „InfoRies“ handelt es sich um Information und Series, demnach fortlaufend produzierte Angebote, die auf Information ausgerichtet sind. Aktualität stellt hier ein wichtiges Charakteristikum dar, das sowohl für Tageszeitungen und Nachrichtensendungen, aber natürlich insbesondere auch bei Websites von Bedeutung ist.
- InfoJect: „InfoJect“ beschreibt die Zusammenführung von Information und Project, also einmalig produzierte, auf Information fokussierte Angebote. Dazu können im Printbereich Sachbücher zählen, während im Feld audiovisueller Medien Dokumentationen darunter fallen.

Die Ähnlichkeit und Substituierbarkeit der Angebote lässt sich auch mit Blick auf Ergebnisse der Erfolgsfaktorenforschung zeigen. Umfassende Ergebnisse liegen zu fiktionaler Unterhaltung vor, die Buch oder Film als Trägermedium hat (Blömeke et al., 2007; Clement, 2004; Simonton, 2009). Während für den Erfolg bei der Leserschaft die Bekanntheit des Autors ein Erfolgsfaktor ist (Clement et al., 2007; Schmidt-Stölting et al., 2011), wirken sich analog Stars und Regisseur positiv auf die Zuschauerzahlen aus (Chang & Ki, 2005; Desai & Basuroy, 2005; Elliott & Simmons, 2008; Hennig-Thurau & Dallwitz-Wegner, 2004; Hennig-Thurau et al., 2012). Ebenso wurde Werbung für Bücher und Filme als Erfolgsfaktor identifiziert (Clement et al., 2007; Simonton, 2009). Auch der Preis wurde als entscheidend herausgestellt (Blömeke et al., 2007; Clement, 2004; Elliott & Simmons, 2008). Auf Seiten des Druckwerks ist der Verlag wichtig (Blömeke et al., 2007). Im audiovisuellen Bereich sind es Produzent und Distributor (Clement, 2004; Meiseberg & Ehrmann, 2008; Reinstein & Snyder, 2005). Der Projektcharakter wird durch die Ergebnisse zur Bedeutung des Markteintrittszeitpunkts bei Büchern und Filmen verdeutlicht (Blömeke et al., 2007; Frank, 1994; Hennig-Thurau et al., 2007; Krider & Weinberg, 1998; Prasad, Bronnenberg, & Mahajan, 2004; Radas & Shugan, 1998; Schmidt-Stölting et al., 2011).

Ebenso lassen sich bei fortlaufend produzierter Unterhaltung, die als Magazin und TV-Sendung verbreitet wird, Parallelen in der Erfolgsfaktorenforschung finden, wenngleich sie deutlich seltener untersucht wird. Für den ursprünglichen Print-Sektor werden hier eine bessere Bedürfnisbefriedigung der Kunden im Vergleich zu Konkurrenz sowie die Wettbewerbsintensität auf Rezipienten- und Anzeigenmarkt als bedeutende Faktoren aufgezeigt (Bleis, 1996; Tschörtner, 2008). Im klassisch audiovisuellen Bereich sind es Konkurrenzsituation auf Seiten der Networks, Ähnlichkeit zu konkurrierenden und die Bewertung der vorangegangenen Sendungen (Shamsie et al., 2006). Ebenso lassen sich Ähnlichkeiten bei der Bedeutung des Alters des Angebots erkennen (Shamsie et al., 2006;

Tschörtner, 2008), was bei einer regelmäßigen Erscheinungsweise natürlich ganz andere Auswirkungen hat als bei einem einmaligen, in sich geschlossenen Projekt.

Berührungspunkte liegen auch bei fortlaufend produzierter Information vor, wie sie Nachrichten darstellen. Für Tageszeitungen ist beispielsweise die Qualität der Inhalte von Bedeutung (Schönbach, 2004). Dies konnte für die technische Qualität von Nachrichtenbeiträgen im Fernsehen, den production value, gezeigt werden (Cummins & Chambers, 2011).

Ein Buch oder ein Film sind jedoch häufig nicht als reine Unterhaltung intendiert. Kreative wollen mitunter gesellschaftlich relevante Themen aufgreifen.¹⁰ Ebenso lässt sich bei Magazinen und TV-Sendungen die Grenze zwischen Unterhaltung und Information nicht klar ziehen (von Rimscha & Siegert, 2008). Bei Nachrichten wird dagegen häufig von Tendenzen der Kommerzialisierung und Boulevardisierung gesprochen (Landmeier & Daschmann, 2011). Demensprechend greift eine bloße Unterscheidung von einmalig versus fortlaufend und Information versus Unterhaltung zu kurz. Durch eine Abstufung der beiden Dimensionen Serialität und Inhalt in drei Ausprägungen kann eine zu starke Verallgemeinerung vermieden werden. Einerseits lassen sich Information, Infotainment und Entertainment unterscheiden. Andererseits wird eine Einteilung in einmalig, mehrteilig oder fortlaufend produzierte Medienangebote getroffen. Die daraus resultierende transmediale Angebotsmatrix lässt sich anhand von Beispielen illustrieren (siehe Abbildung 2).

Informierende Inhalte, die nur einmalig produziert werden, zeichnen Angebote wie Dokumentationen oder Sachbücher aus. Als Beispiel lässt sich *Black Box BRD* nennen, das als Kino-Dokumentarfilm und als Sachbuch erfolgreich war. Handelt es sich um Reihen, so wird mehrteilig produziert, während sich der Inhalt auch an Informationen orientiert. Dazu zählt beispielsweise die Aufarbeitung der österreichischen Geschichte durch Hugo Portisch, die in Buchform und im TV rezipiert werden konnte (*Österreich I* und *Österreich II*). Die Kombination aus fortlaufender Produktion und Information findet man im Nachrichten-Bereich. Hier sind beispielsweise News-Websites, Nachrichten-Clips oder auch Zeitungen zu nennen. Dies wird etwa vom *Guardian* unter einem Dach angeboten.

Fortlaufende Produktionen, die sich Infotainment zum Ziel gesetzt haben, sind Magazine im TV oder Zeitschriften. Hier lässt sich die Marke *Spiegel* anführen, die in beiden Bereichen präsent ist. In den Bereich Infotainment fallen auch WM-Studios oder Online-Sachgeschichten, die mehrteilig produziert

¹⁰ Man denke beispielsweise an *Schindlers Liste* (1993) von Steven Spielberg, der seine Gage aus dem Film für die Gründung der Shoa Foundation als Dokumentationsstelle verwendete, oder an politisch motivierte Filme wie *Deutschland im Herbst* (1978).

werden. Dafür wären spezielle Produktionen zu Großereignissen wie Weltmeisterschaften ein Beispiel. Radio-Spenden-Rallies oder Online-Special-Reports wollen auch unterhalten und informieren und werden einmalig umgesetzt. Hier werden etwa Informationen zu einem bestimmten Thema gezielt aufbereitet und mit einem Aufruf verknüpft.

Serialität	fortlaufend	Nachrichten-Website Nachrichten-Clips	TV-Magazin Zeitschrift	TV-Serie Comicserie
	mehrteilig	TV-Doku Mehrteiler Sachbuchreihe	Spezielle Studios Online-Sachgeschichten	Buchreihe Filmreihe
	einmalig	TV-Doku Sachbuch	Radio-Spenden Rallye Online-Special Report	Kinofilm Roman
		Information	Infotainment	Entertainment
		Inhalt		

Abbildung 2: Transmediale Angebotsmatrix mit Beispielen

Einmalig zum Zwecke der Unterhaltung produziert werden Kinofilme oder Romane. Auf beiden Wegen wird die Erzählwelt rund um *Der Teufel trägt Prada* verbreitet. Auf Unterhaltung zielen auch mehrteilig produzierte Film- oder Buchreihen, wie etwa *Harry Potter*. Fortlaufend werden im Bereich Unterhaltung beispielsweise TV- oder Comic-Serien produziert. So wurde etwa *Pokémon* im TV und als Comic umgesetzt.

Die Grenzlinien der Matrix können dabei nicht als absolut gesehen werden. Auch mit der Einführung einer Mittelkategorie pro Dimension sind immer noch Mischformen denkbar. Insofern wollen wir auch nicht von Angebotsgattungen sprechen, denn die Voraussetzung, dass alle Mitglieder untereinander ähnlicher sein sollen als zu einem Mitglied einer anderen Gattung kann nicht erfüllt werden. Allerdings:

dies ist bei den traditionellen Mediengattungen trotz des Namens auch nie der Fall gewesen. Die Matrix soll es vielmehr ermöglichen, abhängig von der jeweiligen Forschungsfrage Märkte abzugrenzen und Analyseeinheiten zu definieren. Geht man beispielsweise der Frage nach, welche Faktoren den Erfolg von Nachrichtenangeboten bestimmen, kann nicht mehr nach traditionellen Gattungen getrennt geforscht werden. Dagegen bietet sich eine Betrachtung der Medienmarken anhand der Matrix an, da Print-, Radio-, TV-, Online- und Mobile-Angebote mittlerweile in Konkurrenz zueinander stehen. Wo diese verortet werden ist nicht immer statisch. Wird etwa ein Film zur Filmreihe ausgebaut, muss die Einstufung aufgrund dieser Geschäftsentscheidung neu evaluiert werden und das Medienangebot würde neu im entsprechenden Feld angesiedelt. Ebenso verhält es sich bei strategischen Anpassungen, die Auswirkungen auf Serialität und Inhalte einer Medienmarken haben können.

Die hier vorgeschlagene transmediale Angebotsmatrix bietet einen universell einsetzbaren Analyse Rahmen mit zwei Basisdimensionen. Aufgrund der Parallelen, die sich in der Erfolgsfaktorenforschung zeigen, halten wir die Matrix für hilfreich bei der Konzeption empirischer Studien. Wir erheben jedoch nicht den Anspruch, dass es sich bei Inhalt und Serialität um die einzig relevanten Dimensionen handelt. Je nach Forschungsfrage, also dem Zweck der Systematisierung, kann eine auf den beiden Basisdimensionen aufbauende vertiefende Differenzierung innerhalb der Felder sinnvoll sein. Wollte man beispielsweise unterschiedliche Erfolgsfaktoren von Medieninhalten differenzieren, die im öffentlichen Auftrag oder aus kommerziellem Antrieb entstehen, kann der Auftrag als dritte Dimension integriert werden. Für Fragestellungen, die näher am Operationsmanagement sind, kann es ggf. sinnvoll sein, die technischen Rahmenbedingungen der materiellen Trägermedien als Subkategorie innerhalb der Felder der Matrix zu integrieren. Aus Perspektive der Erfolgsfaktorenforschung sind sich Erzählungen in gedruckter Form und in gefilmter Form sehr ähnlich. Trotzdem ist die Arbeit des Produktionsleiters beziehungsweise des Lektors recht unterschiedlich und die Produktionskosten für die Urkopie unterscheiden sich noch immer deutlich. In der Praxis ist die Frage nach der Medientechnik häufig noch nicht obsolet, das zeigen zum Beispiel auch die Schwierigkeiten, die viele Verlage mit ihren crossmedialen Newsrooms haben (Daniels & Hollifield, 2002; Dupagne & Garrison, 2006; Ryfe, 2009). Die Schwierigkeiten sind jedoch nicht auf grundsätzliche (Gattungs-) Unterschiede zurückzuführen, sondern auf Pfadabhängigkeiten und gelernte Routinen bei gattungsspezifisch ausgebildeten Redakteuren.

5 Fazit

Die Einteilung medialer Angebote nach traditionellen Mediengattungen ist vor dem Hintergrund der Digitalisierung nicht mehr zeitgemäß. Eine Systematisierung in einer transmedialen Angebotsmatrix anhand von Serialität und Inhalt erlaubt dagegen eine der Realität der Medienproduktion und -distribution eher entsprechende Verortung. Mit rückläufiger Relevanz der Distributionstechnik wird deutlich, dass beispielsweise die Erfolgsfaktoren eines Romans und eines Kinofilms ähnlicher sind als jene eines Romans und eines Sachbuchs.

Am Beispiel *GEO* soll abrundend aufgezeigt werden, inwiefern die Verankerung der Marke in der Matrix hilfreich ist. Die fortlaufend produzierten Inhalte stellen eine Mischung aus Information und Unterhaltung, also Infotainment, dar (Althans & Brüne, 2005). Diese Inhalte werden den Kunden auf verschiedenen Wegen angeboten: So gibt es beispielsweise Magazine, Websites, E-Commerce und TV unter einem Dach. Magazine treten in diesem Umfeld nicht nur gegen andere Magazine an. Vielmehr ist es die Marke, die in Konkurrenz zu anderen Angeboten steht, die vergleichbare Kundenbedürfnisse befriedigen. Besonders augenscheinlich wird dies auch in der mobilen Welt. Hier gibt es einen Wettbewerb zwischen allen Anbietern substituierbarer Inhalte. Dabei spielt es keine Rolle, ob dieser Anbieter ursprünglich ein Print-, audiovisuelles oder digitales Unternehmen war. Die vorgeschlagene transmediale Angebotsmatrix bietet dafür einen universell einsetzbaren Analyserahmen mit zwei Basisdimensionen. Je nach konkreter Forschungsfrage kann es sinnvoll sein, diese um weitere Kriterien zu ergänzen.

Dementsprechend ist die transmediale Angebotsmatrix ein nützliches Werkzeug für die Forschung im Kontext der Medienökonomie und des Medienmanagements. Zum einen lässt sich in den einzelnen Sektoren anknüpfen, wenn Studien konzeptioniert werden. Zum anderen hilft sie bei der Verallgemeinerung der Ergebnisse und der Theorieentwicklung. So kann auch die Wissenschaft der sich ändernden Medienrealität gerecht werden.

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Sommer et al. (2016): Success factors of media product brands

Examining the building blocks for success across different media types. *International Journal on Media Management* (under review).

Abstract

Media companies and their managers have to develop and adapt products and services as well as processes and business models to exploit opportunities in the digital era. In doing so, knowledge of success factors is crucial.

Success factor research in the media is a fairly broad and fragmented field. Studies till date have focused on single types of media; however, this technology-based distinction is no longer valid. It has been shown that products and services converge as well as their development and production processes. Therefore, the present study aims to synthesize the findings from different media contexts.

On the basis of a comprehensive literature review and semi-structured, in-depth interviews with media professionals from Austria, Germany and Switzerland, ten building blocks of media success are suggested: content, design, environmental orientation, internal processes, organizational aspects, leadership, human resources, marketing, distribution, and external evaluation. The findings support the transferability of success factors on an abstract level and their adaptability for different contexts. They function as hygiene factors representing industry standards and constraints to failure. This study concludes with presenting the implications for media management research and media practice.

1 Introduction

After decades of steady growth and stable business models, the media industry has become dynamic. Consequently, media companies and their managers have to develop and adapt products and services as well as processes and business models to exploit opportunities in the digital era. They need to adjust to their audiences' changing consumption patterns and advertisers' shifting budgets. To strengthen the market position of media companies and to stay ahead of the competition, research on success factors offers valuable insights.

Success factor research is a fairly broad and fragmented field. Studies till date have focused on single types of media; however, this technology-based distinction is no longer valid. It has been shown that products and services as well as development and production processes converge. Consequently, media brands have become increasingly important (Malmelin & Moisander, 2014). A media brand is a defining context for media content, independent of its means of distribution. Examples include news outlets which offer their services on printed paper as well as on a website and mobile applications or a writers telling stories through books, movies, and social media. Success factor research needs to adapt to these changes.

This study aims to synthesize the findings for different types of media and suggest building blocks of success, which are valid across the media industry. The focus is on audience success of individually branded media products or services, while neglecting portfolio strategies and other potential success measures at the corporate level. We empirically evaluate the building blocks of media success on the basis of semi-structured, in-depth interviews with media professionals from Austria, Germany, and Switzerland. The analysis of the transcripts allows us to answer the research questions about the validity of our generalization of the success factors and potential similarities or differences between brands.

This paper is structured as follows: We provide a comprehensive literature review of success factor research in the media and deduce universal building blocks of media success. The empirical part of this study assesses whether these building blocks are in fact generalizable. Thus, we describe the empirical approach. Subsequently, we present the results and discuss our findings. Finally, we present limitations and suggestions for further research as well as a conclusion with implications for media practice.

2 Literature review

Success factor research in the media is a fragmented field. For example, studies tend to focus on one type of media or one region, seldom aiming for universality. Moreover, various methodological approaches have been deployed and no common standards regarding the operationalization of variables or the measurement of success have emerged. Even success as a measure has been disputed since it can be captured differently (Sommer & von Rimscha, 2013). On a basic level, economic and cultural success can be distinguished; however, the latter needs the former to some extent to be sustainable. Although, even when focusing on economic success, multiple options, such as revenue, profit, or return on investment (ROI), can be considered. In doing so, the funding of products and services by audiences, advertisers, or other stakeholders must be considered. As it is not possible to cover all of the different measures and profits as well as ROI figures are notoriously hard to obtain, most research focuses on well-documented success on the audience side, which is a determinant of revenue and arguably the most important (Kaiser & Wright, 2006; Perez-Latre, 2007). Ultimately, without readers, listeners, viewers, and users, a particular media brand cannot serve advertisers and/or stakeholders such as cultural institutions at all. In addition, the reach of media brands is comparable across different types of media and contexts, as media research provides audience figures for every media type.

Investigating factors that influence movies' box office revenues is a well-established subfield as new products frequently hit the market and secondary data is relatively easily available (Clement, 2004; Simonton, 2009). The same holds true in the book sector (Blömeke et al., 2007). For periodical media, the starting point is more difficult as product development is less frequent and success is difficult to define because data is often available only on an aggregated level. Therefore, studies in this field mostly rely on extensive content analysis or surveys (Habann, 2010; Schönbach, 2004). However, there are similarities between different types of media (Sommer & von Rimscha, 2014). Parallels in success factors show, for instance, between books and movies (Blömeke et al., 2007; Clement, 2004; Simonton, 2009), magazines and television shows (Bleis, 1996; Shamsie et al., 2006; Tschörtner, 2008), and printed and audio-visual news (Cummins & Chambers, 2011; Schönbach, 2004). In a previous meta-analysis, 128 studies, which investigated the success factors of media products and services, were evaluated and emerging patterns across different types of media were identified (Sommer & von Rimscha, 2013). As these studies substantially differed in their methodological approaches and measures, a quantitative meta-analysis could not be conducted. Instead, we performed a systematic qualitative review by applying the methods of qualitative content analysis to the 128 studies rather than to original material

such as interviews (Schreier, 2014). In the following sections we will present a condensed version of this analysis by introducing the building blocks of media success as our results. These building blocks of media success can be considered as clusters of success factors, which have been reported to have an impact on different types of media. These clusters are based on similarities in the operationalization of variables in different studies and they were cross-referenced with (media) brand management literature.

Content: Numerous studies identify the content of a media brand as a success factor (Blömeke et al., 2007; Feddersen & Rott, 2011; Schönbach et al., 1997). This can also be seen in the positive effect of the genre and the resulting age restriction (Chang & Ki, 2005; Desai & Basuroy, 2005; Elliott & Simmons, 2008; Hennig-Thurau et al., 2012; Simonton, 2009). Within the scope of a media brand, diversity and variety help increase success with the audience (Kim, 2009; Schönbach, 2004). Research also shows the importance of the content's quality (Bleis, 1996; Kim, 2009; Schönbach, 2004; Wolf, 2006) and innovativeness (Bleis, 1996; Joshi & Mao, 2012; Shamsie et al., 2006) for its reception. In addition, success is supported by genres and topics already established, as sequels illustrate (Chang & Ki, 2005; Elliott & Simmons, 2008; Hennig-Thurau et al., 2009; Joshi & Mao, 2012; Simonton, 2009). Star power, that is, the celebrity of actors or authors, also has a positive impact (Basuroy et al., 2003; Clement et al., 2007; Desai & Basuroy, 2005; Elberse, 2007; Elliott & Simmons, 2008; Schmidt-Stölting et al., 2011; Simonton, 2009). Unsurprisingly, exclusivity is particularly important. In this regard, media brands have to offer content that cannot be found elsewhere to be successful (Wirtz & Ullrich, 2009; Wolf, 2006). This building block is in line with content being at the core of brand identity (Fanthome, 2007; Kim, Baek, & Martin, 2010; Siegert et al., 2011).

Design: How content is presented has a positive effect on media success as well. Structure, layout, and consistency are among the investigated variables that have an influence (Bleis, 1996; Blömeke et al., 2007; Schönbach, 2004). Quality is another important aspect, which does not only apply to content but also to its presentation (Cummins & Chambers, 2011). Overall, design is a building block closely related to questions of branding (Grainge, 2010).

Environmental orientation: Research shows that media brands that take their environment into account are more successful: local orientation has a positive effect (Clement, 2004; Kim, 2009; Schönbach, 2004). Moreover, the competitive situation needs to be considered, and the structured monitoring of trends in the marketplace is important for success (Clement, 2004; Habann, 2010; Kim, 2009; Meiseberg & Ehrmann, 2008; Shamsie et al., 2006; Simonton, 2009; Tschörtner, 2008). Environmental orientation is addressed in media brands' need to differentiate from the competition (McDowell, 2006).

Internal processes: Internal processes influence the success of media brands (Keller, 2009). Communication is characterized as a fundamental part (Büsching et al., 2011). Research shows that integrating the audience in development has a positive effect (Habann, 2010). Diversification and multiple revenue streams of media brands can be considered as further success factors (Clement, 2004; Lubbers & Adams, 2004; Wirtz & Ullrich, 2009). Studies also show the positive impact of budgets (Chang & Ki, 2005; Elliott & Simmons, 2008; Lampel & Shamsie, 2000; Meiseberg & Ehrmann, 2008; Simonton, 2009). Overall, internal processes can be related to the concept of brand orientation (Baumgarth, 2009b; Urde, 1994, 1999).

Organizational aspects: Research indicates the importance of the company backing a media brand. Realizing and utilizing economies of scale and scope leads to synergies, which have a positive impact on success (Bleis, 1996). The organizational environment can provide supportive opportunities for cross-selling and cross-promotion (Blömeke et al., 2007), and it may also offer resources otherwise unavailable (Tschörtner, 2008). Brand management and a match between product- and company brand, in particular, are further advantages to reaching audiences (Chang & Chan-Olmsted, 2010; Habann et al., 2008b). Overall, the collaboration of principal and agent is important. Clear roles and agreements as well as the controlling of development and production processes in terms of quality, costs, and time have a positive influence on success (Zabel, 2009). This building block is related to the literature on corporate brands (McDowell, 2006).

Leadership: The management influences a media brand's success. The age, educational background, and social network of a media outlet's CEO are important. Older, business-trained, and well-connected leaders have a positive effect (Tschörtner, 2008). Other studies show that "good" project management and leadership foster success in the media (Büsching et al., 2011; Habann, 2010). On the product level, the support of stakeholders with leverage in addition to stakeholders with expert knowledge have a positive influence (Bleis, 1996). Leadership is also an issue in brand management (Burmman & Zeplin, 2005; Burmann, Zeplin, & Riley, 2009).

Human resources: In addition to management and leadership, employees are valuable. High levels of skill and motivation (Bleis, 1996) as well as qualifications and specialized knowledge (Büsching et al., 2011; Wolf, 2006) are important for a media brand's success. Experienced individuals having successfully worked together in previous projects also have a positive influence (Meiseberg & Ehrmann, 2008). This building block is related to the literature on media brand centered human resource activities (Burmman & Zeplin, 2005; Burmann et al., 2009; Maxwell & Knox, 2009).

Marketing: Brand management is identified as a success factor in the media (Baumgarth, 2004a; Chang & Chan-Olmsted, 2010; Förster, 2011; Habann et al., 2008b). This is closely related to the brand's positioning (Greve, 1996; Wolf, 2006), price (Blömeke et al., 2007; Clement, 2004; Elliott & Simmons, 2008, p. 108; Kim, 2009; Rademacher & Siegert, 2007) and an adequate target audience (Hennig-Thurau et al., 2012, p. 271). Adjusting to and satisfying the specific wants and needs of the audience have a positive effect on media success (Bleis, 1996; Boatwright et al., 2007; Schnell, 2008). In addition, advertisers have to be taken into consideration. Their acceptance of a new product is of utmost importance (Habann, 2010). On the audience side as well as in the advertising market, the offer has to be more attractive and meet the needs better than competing products to be successful (Bleis, 1996). Market research fosters success through the collection of valuable information for development and planning (Schnell, 2008; Wyatt, 1994; Yoder, 2004). Technological developments facilitate the creation of communities around media brands, possibly resulting in increased loyalty, involvement, and intensity of usage (Kolo & Vogt, 2004). Furthermore, participation, motivation, and connection of users are ascribed a positive influence (Wirtz & Ullrich, 2009). Similarly, word-of-mouth has a positive effect on media success (Blömeke et al., 2007; Clement, 2004; Hennig-Thurau et al., 2012; Liu, 2006). Finally, advertising materials and activities as well as marketing budgets are important for a media brand to be successful (Blömeke et al., 2007; Clement, 2004; Clement et al., 2007; Elliott & Simmons, 2008; Förster, 2011; Hennig-Thurau, Houston, & Sridhar, 2006; Hennig-Thurau et al., 2012; Schönbach, 2004; Simonton, 2009). This building block is closely related to brand management literature (Chan-Olmsted, Cho, & Lee, 2013; Pauwels & Dans, 2001).

Distribution: By whom, how, and where the content is distributed influences success in the media (Blömeke et al., 2007; Boatwright et al., 2007; Chang & Ki, 2005; Feddersen & Rott, 2011; Hennig-Thurau et al., 2012; Lampel & Shamsie, 2000; Liu, 2006; Meiseberg & Ehrmann, 2008; Simonton, 2009). Getting the timing and (sequential) release date correct is also crucial (Frank, 1994; Hennig-Thurau et al., 2007; Schmidt-Stölting et al., 2011; Shamsie et al., 2006; Tschörtner, 2008). In recent times, multi- and cross-media distribution is ascribed a growing influence on success (Habann, 2010; Wolf, 2006). Cross-media issues have also received considerable attention in brand management and brand transfer literature (Chang & Chan-Olmsted, 2010; Habann et al., 2008b; Hennig-Thurau et al., 2009; Tarkiainen, Ellonen, & Kuivalainen, 2009).

External evaluation: In addition to the internal factors that were previously discussed, the external perception and evaluation of media brands influences success. This holds true for media coverage in general, and particularly for critical reviews (Clement et al., 2007; Gemser et al., 2007; Hennig-Thurau

et al., 2012; Lampel & Shamsie, 2000; Reinstein & Snyder, 2005; Simonton, 2009; Zuckerman & Kim, 2003). Additionally, awards have a positive effect on success (Clement, 2004; Lee, 2009; Simonton, 2009). This building block is related to brand management literature focusing on reputation (Eisenegger & Imhof, 2007; Lobigs, 2015).

Following the evaluation of the results of prior studies in the field of success factor research in the media, ten building blocks of media success can be identified: content, design, environmental orientation, internal processes, organizational aspects, leadership, human resources, marketing, distribution, and external evaluation. However, an empirical analysis of these building blocks of media success across different types of media is still missing. Therefore, the present study focuses on the following two research questions:

- Are building blocks of media success valid for media brands across different means of distribution?
- Are there similarities between different types of media brands in terms of the importance of certain building blocks of media success?

To allow for comparisons between different types of media, we utilize “reach” in the respective audience market as a measure for success. While universal, it has to be kept in mind that this measure is still relative, as the respective audience markets may differ considerably in size. For example, a television show needs a higher reach to be considered a success compared to a non-fiction book.

The following section describes in detail how we approached these two research questions.

3 Method

To answer the research questions, we conducted semi-structured, in-depth interviews with media professionals in Austria, Germany, and Switzerland. This method is particularly suitable for exploratory research questions such as this first attempt to generalize results of success factor research in the media across the industry. It allows us to evaluate the suggested building blocks of media success, and to detect similarities and differences between media brands. Strictly speaking, in-depth interviews only allow us to assess success factors as they are perceived by our interviewees. However, as the “true” drivers of success are not accessible, the accounts of the involved individuals serve as suitable proxies.

Reflecting the idea that technological characteristics are no longer a valid distinction of media products and services, our case selection for the interviews was brand based. Media brands are a unique environment, as they are independent from a means of distribution and they can be distinguished depending on their seriality and content. Seriality defines production processes and it is closely related to media brands being experience goods. Content determines which resources are necessary and which needs have to be served. These two dimensions are particularly important for determining substitutes and competition in the digital era as well as potentially accounting for similarities and differences in the importance of building blocks of media success between media brands (Sommer & von Rimscha, 2014). For instance, *The New York Times* does not only compete with other newspapers, but it competes with media outlets such as *Buzzfeed*, *Circa*, *ESPN*, *First Look Media*, *Flipboard*, *The Guardian*, *The Huffington Post*, *LinkedIn*, *Medium*, *Quartz*, *Vox Media* and *Yahoo News* (The New York Times, 2014). To select brands, we distinguished between one-off, multi-part and continuous production in terms of seriality, and information, infotainment and entertainment in terms of content. On the basis of trade press coverage and brands' self-classification, we compiled a list of more than 50 successful and unexpectedly unsuccessful media brands. In doing so, we considered the criteria balance, variety, and opportunity to learn (Stake, 1995). We aimed for a balanced distribution of brands across the two dimensions of seriality and content, meaning an equal number of brands in every category. At the same time, they should vary in terms of maturity and audience size to have young media brands and well-established ones in our sample as well as brands with mass appeal and a niche focus. In addition, media coverage had to emphasize something special about the brand, such as using multiple means of distribution or being very traditional. The selection of brands was qualitative and not standardized in order to utilize the vast knowledge of the team of researchers and to guarantee a diverse sample. To obtain a better picture of each brand, we intended to interview three media professionals with a good overview of the brand as a whole and who were involved in its development, production, and marketing stages. Overall, we conducted 39 interviews between November 2014 and March 2015 across 20 media brands (see Table 1). Despite these efforts, this study remains qualitative in nature and it does not claim representativeness.

To conduct the semi-structured, in-depth interviews, we developed interview guidelines based on the literature review. They included questions on the relevance of every building block for media success as well as open questions on additional factors in case they had not been identified in previous research. We also asked the interviewees to name the most important ones. The interview guidelines were customized for every media professional on the basis of supplementary desk research on the media

brand and the interviewee's professional background. Accordingly, the respondents were asked to refer to the media brand in question as well as their experience in other projects when assessing and elaborating on the importance of building blocks of media success. The interviews were informal in nature and lasted between 36 and 128 minutes. They were recorded and subsequently transcribed.

Table 1: Brands and Interviews

Brand	Country	Interviews	Description	Content	Seriality
2012	AT	2	End of the world	Infotainment	Multi-part
Anno 1914	CH	2	History and fiction	Infotainment	Multi-part
Bestatter	CH	2	Fiction	Entertainment	Multi-part
Clixoom	DE	1	Explainers	Infotainment	Continuous
Das grosse Los	DE	2	Travel	Entertainment	One-off
Der Koch des Königs	CH	2	Portrait	Entertainment	One-off
Echo der Zeit	CH	3	News	Information	Continuous
Fack ju Göhte	DE	1	Fiction	Entertainment	One-off
FernOst	DE	2	Documentary	Infotainment	Multi-part
Jassen	CH	1	Game show	Entertainment	Continuous
Jung & Naiv	DE	1	Political interviews	Information	Continuous
Kastelau	CH	1	Fiction	Infotainment	One-off
Landlust	DE	1	Nature	Infotainment	Continuous
Puls 4 Wahlarena	AT	3	Political discussion	Information	Multi-part
SF DOK	CH	3	Documentary	Infotainment	Continuous
Tag und Nacht	CH	4	Fiction	Entertainment	Continuous
Tagebuch der Arabischen Revolution	AT	2	News about historical event	Information	One-off
The Voice	DE	1	Casting	Entertainment	Multi-part
Watson	CH	2	News and entertainment	Infotainment	Continuous
Wien Tag und Nacht	AT	3	Scripted reality	Entertainment	Continuous

The literature review and the interview guidelines served as a framework for coding the transcripts (Simons, 2009). However, we remained open for further themes emerging from the data. Moreover, we created abstracts for every interview and summarized the main points for each of the ten building blocks of media success. For our analysis, we followed two paths. On the one hand, we looked at the parts of the transcripts coded as “success factors”, while on the other hand, we worked with the abstracts. This approach helped us to cope with the extensive material and obtain a better sense of emerging patterns as well as the relative importance of success factors. In the following, we merged

these two streams to cross-validate and strengthen our results. Throughout the analysis, we went back to the original material multiple times to further improve the findings.

When designing and conducting the study, we carefully considered the quality criteria of qualitative research (Yin, 2009). To enhance reliability, we defined the steps and processes to be followed whilst interviewing the media professionals and analyzing the transcripts. In terms of construct validity, we conducted supplementary desk research and aimed to speak with three media professionals per case. Internal validity was enhanced through alternative methods of analyzing the data such as cross-brand pattern matching and explanation building. External validity was supported by examining a diverse range of media brands and building the guidelines for data collection and analysis on the basis of a thorough literature review.

4 Results

In the following, we will present the interviews' common themes and patterns, which emerged across different types of media for each building block of media success. The results are supported by quotes from the respondents representing media brands positioned differently along the dimensions of content and seriality. Consequently, we can assess whether a building block of media success is valid for media brands across different means of distribution.

Content: Overall, content was portrayed as the most important building block of media success. The genre and the way it is presented were said to be crucial. According to two interviewees, "*Content is king*" (Watson) and "*Content determines reach*" (SF DOK). Star power was also thought to have a very high impact on a media brand's success. This holds true for actors and authors as well as for presenters and journalists. Positive topics were considered to outperform negative ones, and diversity was valuable for reaching a wider audience. High levels of quality, credibility, and authenticity positively influence success. In the narrower sense, quality and credibility were particularly important for informational content. In entertainment, credibility and authenticity were related to characters and stories being successful. Timeliness was pointed out for news content especially, while capturing the *zeitgeist* is a crucial factor across cases: "*Asking why something is a hit-format is essentially asking what the zeitgeist is*" (The Voice). Finally, newer brands seemed to emphasize the importance of experimentation more than established ones. However, the interviewees agreed that incremental innovation of contents were accepted by audiences more easily than fundamental changes.

Design: Although not as important as content itself, its presentation was considered a success factor across all brands. For *The Voice*, “A sophisticated production is important for success.” Quality and consistency of the contents’ presentation were considered to have a positive effect. Aesthetics were particularly important for the initial selection of a media brand; although, design and style are becoming more valuable: “Industry knowledge about dos and don’ts is readily available” (2012). The interviewees referred to the importance of fulfilling certain standards and the comparison to American media products and services. *Koch des Königs* was described as “state of the art,” which illustrates design as being a hygiene factor. However, the scope of a project limits possibilities. This is particularly true for optimizing contents for the different channels that a media brand serves, which is becoming increasingly essential.

Environmental orientation: Although keeping an eye on current trends and the competition was regarded as important, it was seldom conducted systematically. The interviewees spoke about monitoring the environment on an ongoing basis; however, they did not describe particular processes for the collection and use of the information. As an exception, *The Voice* tailored its brand as an answer to its competitor. For *Anno 1914*, on the other hand, “The analysis of the competition was not important.” Local orientation enabled the Austrian and Swiss brands to distinguish themselves from German competitors and American content: “As a rule of thumb, what’s local receives more audience attention than any other piece on far-away places” (SF DOK). In entertainment, the importance of deploying Austrian and Swiss language was emphasized (*Bestatter, Wien Tag & Nacht*). Finally, German brands had fewer problems with competition from other markets in the information sector; however, they also needed to distinguish themselves from American entertainment.

Internal processes: Development and production followed standardized processes, which were similar from day to day and project to project. Guidelines and routines seemed to be well established across the industry. Accordingly, the interviewees did not describe their processes as unique and thus, they were another hygiene factor. As an exception, *Watson* focused on “flexibility, decentralization, and communication.” This startup challenged trusted rules and worked resource-efficient. Throughout many of the cases a “green light moment” was described. The resources (in terms of budget and time) were referred to as a success factor of media brands with potentially restricting effects for internal processes: “We have comparatively more time to research and prepare our interviews, and that translates into superior quality” (*Echo der Zeit*). Considering different revenue streams was regarded as important, yet media brands failed to include them in their initial strategy: “It rather happens as an afterthought” (*Wien Tag & Nacht*). For the younger media brands, integrating the audience in the creation of informational content

was important. In entertainment, communities to discuss the content were established around the media brand. These communities were more important for periodical media, while one-off projects attempted to engage readily available communities. Integrating the audience was less important for one-off media brands. Internal processes also heavily depended on and greatly varied with the organizational background.

Organizational aspects: The backing of an organization was particularly important with respect to the resources available to a media brand. Without such support, stand-alone ventures would have difficulties surviving: *“In its current form, the media brand could not exist in a different setting”* (*Echo der Zeit, Jassen, Puls 4 Wahllarena*). A strong fit of organization and media brand was considered to be a success factor. The interviewees emphasized the advantages of synergies (*Echo der Zeit*) and media brands supporting one another (*Anno 1914*). For one-off projects, organizational aspects had very limited external value and they were ascribed a marginal role on the audience side. However, the distribution process was an exception. Multi-part media products and services relied heavily on preexisting structures. Media brands with continuous development and production processes saw interdependencies and mutual influences between brand and organization (*Watson*). In some cases, however, the organization was perceived as hindering development of the product, for example, because of bureaucratic coordination procedures and adherence to overly strict guidelines (*Echo der Zeit, Tag und Nacht*).

Leadership: The project manager fulfilled a crucial role in steering the team and the brand towards success. Management styles were described as being democratic and laissez-faire to give employees plenty of freedom and flexibility: *“I always try to create a team spirit. We are in the same boat. We do this together”* (*Puls 4 Wahllarena*). Support from within the organization and in particular management was described as being important, especially in the case of multi-part projects (*2012, Puls 4 Wahllarena*). The success of a previous project was extremely important for securing support and funding for a new project (*FernOst*). The star power of the leader, especially an individual with a high degree of status and prestige within the industry, can lure talent toward a media brand, which has a positive influence on success (*Puls 4 Wahllarena*). Conversely, a lack of knowledge and understanding for certain genres at top hierarchy levels were said to have negative effects (*Tag und Nacht*).

Human resources: The team was described as being extremely important for a media brand's success. Employees' know-how and competencies were crucial. For informational content, these lie in specialist knowledge, while creativity was important in entertainment. This is closely related to staff experience, which was considered another success factor. In addition, the level of motivation of employees was

important. However, the staff was regularly described as replaceable. The necessary knowledge and skills were usually not specialized to such an extent that there were no alternatives at hand: *“When we have changes in the team we try to make sure that the balance remains the same. Experience and competence need to be assured”* (*Echo der Zeit*). Apart from these more objective categories, the chemistry and interactions within the team were emphasized. Moreover, it was stated that people have to work well together and the success of a media brand benefits from the team members having worked together on a previous project (*Tagebuch der Arabischen Revolution*). While this is easily achievable for periodical media, in one-off productions, it was compensated through consecutive projects and by re-using teams.

Marketing: Market research played a marginal role for the media brands we investigated. In some cases, it was even met with skepticism *“Market research kills ideas”* (2012). The advertising side of the media business was barely taken into account. The interviewees primarily had some information about the audience and thought of imaginary recipients when developing and producing content: *“We always think about who could be the extended audience”* (*Das grosse Los*). Focus groups and surveys were not extensively used. Market research was even less important for one-off productions. However, younger media brands, were more inclined to use audience information. Carving out a niche was expected to foster media success (*Landlust*), while advertising was seen as a success factor across media brands, since it was crucial for generating awareness. Public relations was another tool heavily used for this purpose. Using the media brand as a quality signal and being able to exploit its reputation was seen as an advantage. In one-off projects, this was achieved through ingredient branding, such as building on the popularity of a participant (*Fack ju Göhte*). The interviewees emphasized that, for entertainment brands, matching advertising and content worked particularly well (*Bestatter*). For informational content, well-executed cross-promotion and collaboration played an important role (*Puls 4 Wahlarena*). These efforts ideally led to word-of-mouth effects, which were considered to be another success factor. Generating word-of-mouth was particularly integrated in younger media brands' strategies. They also place emphasis on social media. Finally, product pricing played a minor role in marketing efforts, since the media brands seemed to follow industry standards.

Distribution: Distribution was strongly connected to the type of content. Accurate timing of entering and serving the market was considered to be particularly important (*Wien Tag & Nacht*). Exclusivity was especially valuable. The interviewees emphasized the importance of optimizing the means of delivery for the target group. Cross-media predominantly played a role for periodical products and services. In addition, the younger media brands were more likely to serve multiple channels (*The Voice*). Cross-media's importance was increasing, but it did not reach very high levels. Overall, distribution

was the only building block of success that strongly depended on the type of media that the brand originally or predominantly served. Accordingly, the success of television-based media brands depended, to a substantial degree, on the time slot. Streaming services were becoming increasingly popular; however, monetization still relied on traditional audience measures.

External evaluation: The external evaluation of media brands through reporting and reviews was considered to be important, and whether positive or negative, it increased awareness: *“The main thing is that they write about you” (Jassen)*. Differing opinions were thought to be particularly effective in creating buzz about a media brand. In entertainment, the audience talking about the product or service and the resulting word-of-mouth effects were important. For informational content, the relevance of external evaluation was more connected to the reputation of a media brand. It was found that reviews were well established for one-off projects, where they have a significant influence (*Kastelau, Tagebuch der Arabischen Revolution*). For periodical media, reporting and reviews were less important. However, taking feedback into consideration was regarded as advantageous. Despite that it was rarely conducted systematically, the media brands monitored follow-up communication on social media (*Clixoom*). Finally, awards were predominantly important within the industry and they were not ascribed to have large effects on the success of a media brand in the audience market.

5 Discussion

Overall, the interviewees had no problems relating the building blocks of media success that we derived from the literature to their context. In doing so, they highlighted certain success factors within the respective building block. In some cases, they explicitly stated *“Yes we have that, but we don’t call it that way” (SF DOK)*. Asking the interviewees about success factors not covered during the interview did not provide additional findings. They stated that the important aspects had been mentioned and they emphasized what they found most relevant. Therefore, our interviews support the transferability of success factors and the generalization of building blocks of media success.

However, the relevance of media technology prevails in the contexts of distribution and—to some extent—marketing. Path dependencies with respect to market release of media brands are strong and the distribution technology still has decisive repercussions. In analogy to research on newsroom convergence (García Avilés & Carvajal, 2008), one might say that the industry runs a cross-media model rather than an integrated one. For instance, a media brand based on a book focuses on the logic of the

book market and adds a digital strategy. Entertainment production is still organized around television schedules and it mostly considers streaming as an afterthought.

Instead of focusing on distinguishing traditional types of media, we expected to find pronounced similarities and differences between media brands along the two dimensions of seriality and content. In our results, these patterns did not emerge strongly. Certain aspects of the ten building blocks were formed differently to some extent, emphasizing one aspect over another (e.g., quality for information vs. authenticity in entertainment) or having a slightly different meaning (e.g., getting the timing right refers to the perfect time slot in television and the best release date for a book). However, we see media brands and their building blocks of success converging, even when distinguished in terms of seriality and content. This shows through one-off media brands building on pre-existing teams and employees who have previously worked together successfully. It is especially the case for media brands that offer standardized content, such as familiar topics and genres, rather than experimentation and innovation. Thus, our results somewhat confirm the critique by Bolin (2007, p. 244) who claims that transmedia storytelling would “mean that texts are constructed in order to function on several platforms, which might then be limiting for what can be told or represented.” However, it must be kept in mind that success factors of one-off projects do not necessarily have to be sustainable. Their added value can be captured before a competitor is able to imitate or substitute them. Entertainment orientation and gamification in news development and production are examples for convergence on the content dimension. In addition, a third dimension seems to have an influence on the formation of building blocks of success: the maturity of the media brand. As an example, younger media brands tend to think of potential revenue streams and social media strategies from the beginning, while it is only an afterthought for traditional media. However, the latter are attempting to catch up and adapt, which illustrates the convergence on this dimension (Chan-Olmsted, 2011; Chan-Olmsted, Cho, & Yim, 2013). While we are unable to answer our second research question sufficiently, these findings support the transferability of success factors identified for distinct types of media across other media brands.

When specifically inquiring about the dominant driver of audience success, the interviewees emphasized content and mostly referred to platitudes like “*the right idea at the right time*” or “*luck*.” This supports the notion that the building blocks of media success are hygiene factors and constraints to failure, which need to be in place to create a situation where success can occur. The building blocks of media success can thus be regarded as necessary but not sufficient conditions for success in the audience market. Figure 1 summarizes the ten building blocks of media success and highlights content

as being perceived as most important, while marketing and distribution are described as being path dependent.

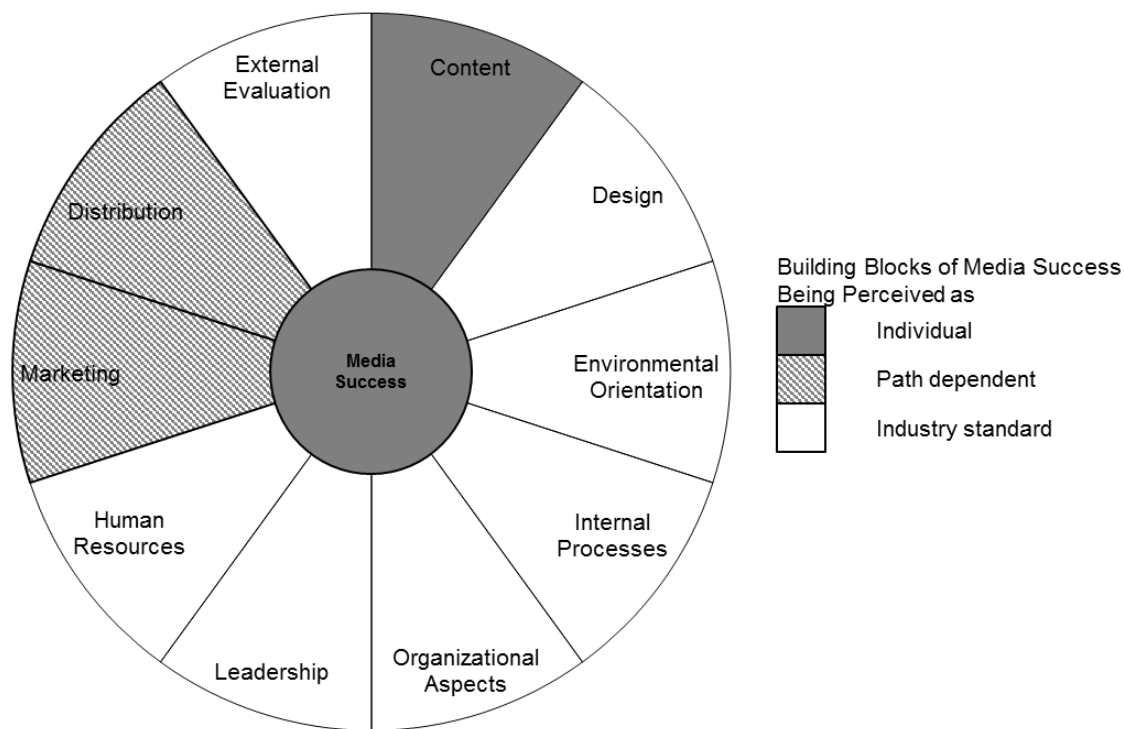


Figure 1: The building blocks of media success, as perceived by the interviewees

Certain building blocks of success in the media are very similar to those in other industries such as leadership and human resources. Thus, the results are of significance to success factor research in general and they should be taken into consideration when investigating performance as a dependent variable. However, in the media, different aspects are emphasized within these building blocks, such as the management of creativity, which makes the media industry unique (Chan-Olmsted, 2006c; Sommer, 2015).

Consequently, the ten building blocks of media success have to be considered when developing, producing, and marketing a media brand. Different options for combining them can be evaluated. In doing so, media managers have the opportunity to analyze industry standards in order to build their competitive advantage and unique selling proposition. The building blocks of media success are

particularly important in a transmedia environment, as the focus shifts towards capabilities and competencies. Depending on the challenge, they can be easily adapted and modified.

6 Limitations and further research

The literature till date merely lists factors that, for a limited number of similar cases, have had a positive impact on the success of a media product or service. When confronted with these success factors, the interviewees generally considered everything as important. However, the length and detail of their statements allowed preliminary conclusions about their relative importance. The media professionals also regarded their project as something special. However, when referring to other media brands and through the patterns emerging from the data, this argument does not hold true. To gain a better understanding of the relative importance of the building blocks of media success as well as the similarities and differences between media brands on a representative level, a standardized survey of media professionals is needed. Our qualitative data did not allow us to answer these questions sufficiently.

An initial basic model of media success would suggest a simple additive function where higher levels in each building block lead to greater success. Clearly, this is an oversimplification. When applying the building blocks of media success to different media brands, success factors will probably carry varying weight. Interactions between the factors might depend on the media brand in question. Qualitative Comparative Analysis (QCA) is a context-sensitive method that could lead to new insights for success factor research in the media as examples from other industries show (Ordanini & Maglio, 2009; Vis et al., 2007; Winand et al., 2011). Based on Boolean algebra, it would allow to identify the necessary and sufficient conditions of media success. In comparison to regressions analysis, different paths are possible and the building blocks of success interact rather than compete with one another (Ragin, 1987, 2000, 2008). Furthermore, QCA would allow to identify factors that usually act as drivers of success, but in some contexts, turn into constraints such as when an international star actor is impeding the credibility of a production building on cultural proximity.

7 Conclusion

In scientific literature, a wide range of success factors have been identified for different types of media. However, in times of convergence and digitalization, technical means of distribution lose relevance

compared to media brands, which are becoming increasingly important. Accordingly, we aggregated the findings from different contexts and empirically evaluated ten building blocks of media success: content, design, environmental orientation, internal processes, organizational aspects, leadership, human resources, marketing, distribution, and external evaluation.

We found that these building blocks of media success are applicable across different media brands. On an abstract level, success factors can be transferred to and adapted for different contexts. The building blocks of media success can function as hygiene factors representing industry standards and constraints to failure. For studies focusing on a single type of media, these findings mean that researchers should also look into research on other media types when designing their projects. However, brand-based approaches to investigating success factors in the media circumvent this issue and thus, they are potentially more valuable.

Overall, content is perceived to be most important for media success. The interviewees emphasized how it determined the audience that the media brand was able to reach. Moreover, they highlighted that it was crucial to meet the zeitgeist. From our study design, it remains open whether this is actually the case or simply the result of the desirable self-portrayal of media professionals as being content oriented.

The building blocks of media success should be taken into account in media practice. With media brands becoming increasingly important, platform-independent capabilities and competencies are crucial. While not providing precise directions to become successful, our findings lay the foundation for analyzing a media brand and comparing it to other players in the market. Consequently, media managers can define which success factors to focus on and develop in a unique way. In other words, the building blocks of media success form the “ground floor”, while designing the upper stories and the roof very much depends on the media brand.

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1 Declaration of co-authorship

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N.B. Bjørn von Rimscha suggested the dimensions seriality and content to distinguish media brands, wrote section 3 and contributed to section 4 as well as the revision of the paper.

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Erklärung

Hiermit erkläre ich, dass

- die Dissertation von mir selbst ohne unerlaubte Beihilfe verfasst worden ist und
- diese Dissertation noch an keiner anderen Fakultät eingereicht wurde.

Ort und Datum

Unterschrift

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